ONTARIO

IN CANADA'S
Trade and Commerce

The Province of Ontario in the Canadian Market

This booklet is published by the Ontario Department of Planning and Development to portray the opportunities for industrial development in this Canadian Province. It is specially directed to the attention of manufacturers contemplating the establishment of plants in the Dominion of Canada.

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ONTARIO

DEPARTMENT OF PLANNING AND DEVELOPMENT
TRADE AND INDUSTRY BRANCH
QUEEN'S PARK, TORONTO

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Published 1946

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F. J. LYLE, O.B.E.,
Director
Trade and Industry Branch

Section I

CANADA

Industrial Development

and

The Canadian Market

Data and Statistics Supplied

by

Dominion Bureau of Statistics

DEPARTMENT OF TRADE AND COMMERCE

OTTAWA

for the

TRADE AND INDUSTRY BRANCH
DEPARTMENT OF PLANNING AND DEVELOPMENT
QUEEN'S PARK - TORONTO
ONTARIO

COMPILED AND DRAWN AT THE OFFICE OF THE SURVEYOR GENERAL AND CHIEF HYDROGRAPHIC SERVICE OTTAWA.

Canada is a federation of Provinces whereas the United States is a federation of States. From east to west the Canadian Provinces are: the Maritime Provinces of Prince Edward Island, Nova Scotia and New Brunswick, all three comparatively small in area; Quebec; ONTARIO; Manitoba, Saskatchewan and Alberta, the Provinces of the Interior Plain known as the Prairie Provinces; and British Columbia, the Province of the Cordilleran Region.

The Province of Ontario lying between Quebec and Manitoba is located in the very heart of the Dominion. The surface formation is characteristic of the Precambrian Shield in the area around Hudson Bay and extending from the north deep into the Province, but the southern portion lying between the Great Lakes is characterized by rich agricultural land, fairly low and level. Mining is a very important industry throughout the widespread Precambrian area. Although lacking in native coal, Ontario is rich in almost all other commercial minerals and contributes about half of the total mineral production of the Dominion.

DOMINION OF CANADA

GENERAL INFORMATION

Situation—The Dominion of Canada comprises the whole northern part of the North American Continent with its islands, except the United States territory of Alaska and the territory of Newfoundland (with Labrador).

Area—The area of the Dominion is 3,695,189 square miles, a figure that may be compared with that of 3,735,209 square miles for the United States and its dependent territories; 3,776,700 the total area of Europe; 2,974,514 the area of Australia; 3,275,510 the area of Brazil; 1,581,079 the area of India (excluding Burma); 120,849 the area of the British Isles. Canada's area is 28 p.c. of the total area of the British Empire.

Government—Canada enjoys responsible Government of the British type. In 1867 the colonies of British North America were federally united into one Dominion under the British North America Act. The British North America Act is still the written constitution of Canada. The provinces under it retain their rights as sovereign political units with certain stated powers remaining to them. All other powers, not exclusively assigned to the provinces, are vested in the Dominion.

For federal purposes the Sovereign is represented by a Governor-General who, with the Senate and House of Commons, makes up the Parliament of Canada. In each province the King is represented by a Lieutenant-Governor who, with the Legislative Assembly (and an Upper House the Legislative Council in the case of Quebec), makes up the Provincial Parliament. The Cabinet system of government exists in both cases, whereby an Executive Council or Cabinet made up of members from the political party holding a majority in the elected House in either the Dominion or the Province constitutes the Executive but holds power only so long as it has the confidence of Parliament.

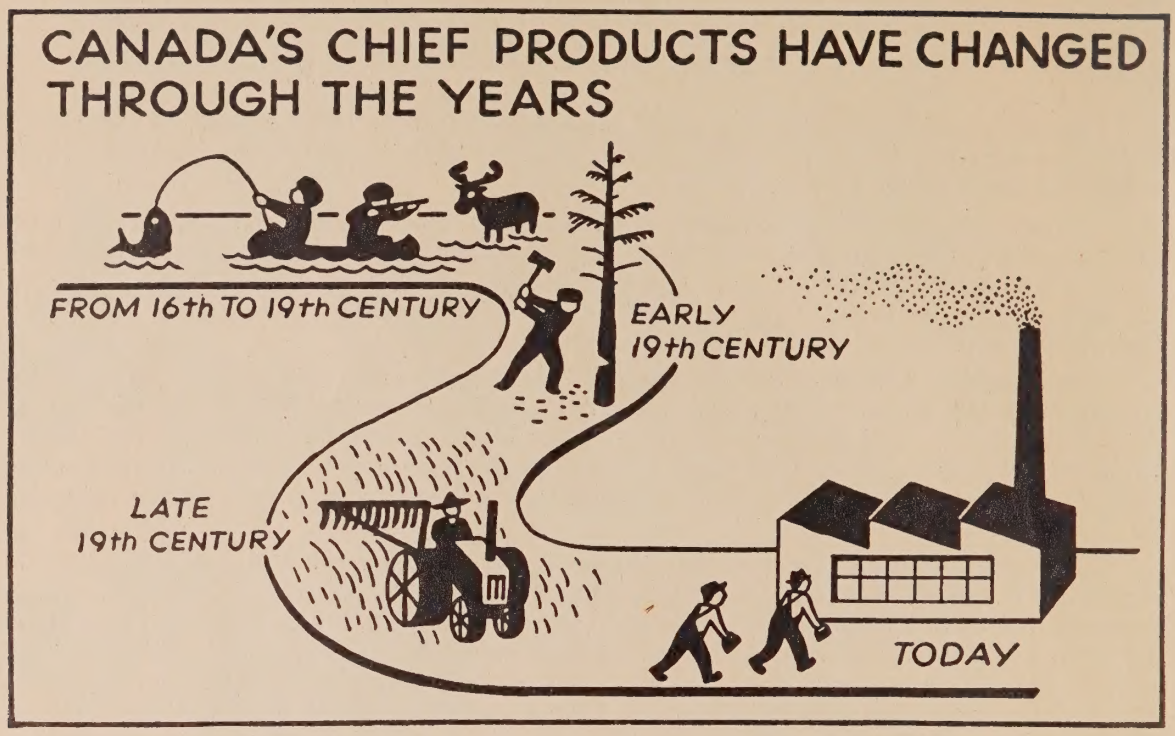
Natural Resources—In general, the resources of Canada are rich and diversified. The agricultural Province of Prince Edward Island is noted for its relative predominance in the fox-farming industry, its lobster canneries, its oyster beds and its production of seed potatoes. Nova Scotia leads the other provinces in the production of coal which is of a bituminous variety and good quality. The forest resources of New Brunswick are of first importance economically, but large areas of rich agricultural land are found in the numerous river valleys. The fisheries of the Maritime Provinces are world renowned.

The extensive Province of Quebec supports a very valuable tree growth which is the basis of a great pulp and paper industry and her rivers give her a foremost position in the development of hydro-electric power. The asbestos deposits are known for their quality and extent. Gold, copper and other metals abound in the extensive mineralized area of the province. Mixed farming and the production of vegetables on a commercial basis are widely carried on.

Ontario's rich mineral resources are covered in a special section. Although lacking in native coal resources, Ontario's position on the Great Lakes waterways system permits coal to be economically transported from Pennsylvania and iron ore from Minnesota to provide the basis of a large iron and steel industry. There are also native iron-ore deposits of considerable extent and richness. The excellent soil and the wide variety of climate support an extensive agriculture—dairying and fruit growing, tobacco and sugar beets, and cattle and market gardening. Vast forests, together with extensive and well-located hydro power, are the basis of large wood-using industries and the northern forests are a rich fur preserve.

The Prairie Provinces of Manitoba, Saskatchewan and Alberta (especially Saskatchewan) are the great wheat-growing areas of Canada. About three-fifths of Manitoba, however, is underlain with Precambrian rock in which rich deposits of base metals have been found: waterpower sites are also abundant. The northern areas of Saskatchewan and Alberta have valuable forests and Alberta has the most extensive coal resources of any province of the Dominion and is the leading producer of petroleum and natural gas.

British Columbia's great wealth lies in her forest resources which support vast lumbering and pulp and paper industries. The province also excels in fishery products, especially salmon. The mineral resources are remarkable for their wealth and variety.



Manufactures—Canada's early trade was founded on the wealth of the fur trade and the fishing industry. These brought the first European capital to North America and beckoned the explorers "l'aventeurs" ever westward.

Early in 1800 saw the earliest development of Canada's lumber industry, and the establishment of a substantial export trade, carried in Canadian-built wooden ships.

The late 19th century saw agriculture develop to a point where it became Canada's most important industry, with its products topping all others in export trade.

Canada's status as a manufacturing country may be said to have been definitely established during the War of 1914-18, and before the outbreak of war in 1939 Canada was the second largest manufacturing country in the British Empire. To-day the War has left Canada in third place in export trade among all nations. In 1913, 63 p.c. of Canada's export trade was raw materials and only 37 p.c. manufactured goods. In 1944, 22 p.c. was raw materials and 78 p.c. manufactured goods. Canada's exports of machinery, (not including farm implements), increased from less than one-half million in 1900 to approximately 25 million in 1944. At the peak of production during the War of 1939-45 about 64 p.c. of Canada's total production capacity was being used for war purposes although the average during the war years was probably something like 50 p.c. as compared with only 10 p.c. in the War of 1914-18. This is an amazing record for a country so little removed in time from the pioneering stage as Canada.

On page 11 the net value of 30 leading industries in the provinces of Ontario and Quebec is given for the latest pre-war year 1939. This year is selected as approximating more normal conditions than the more recent war years.

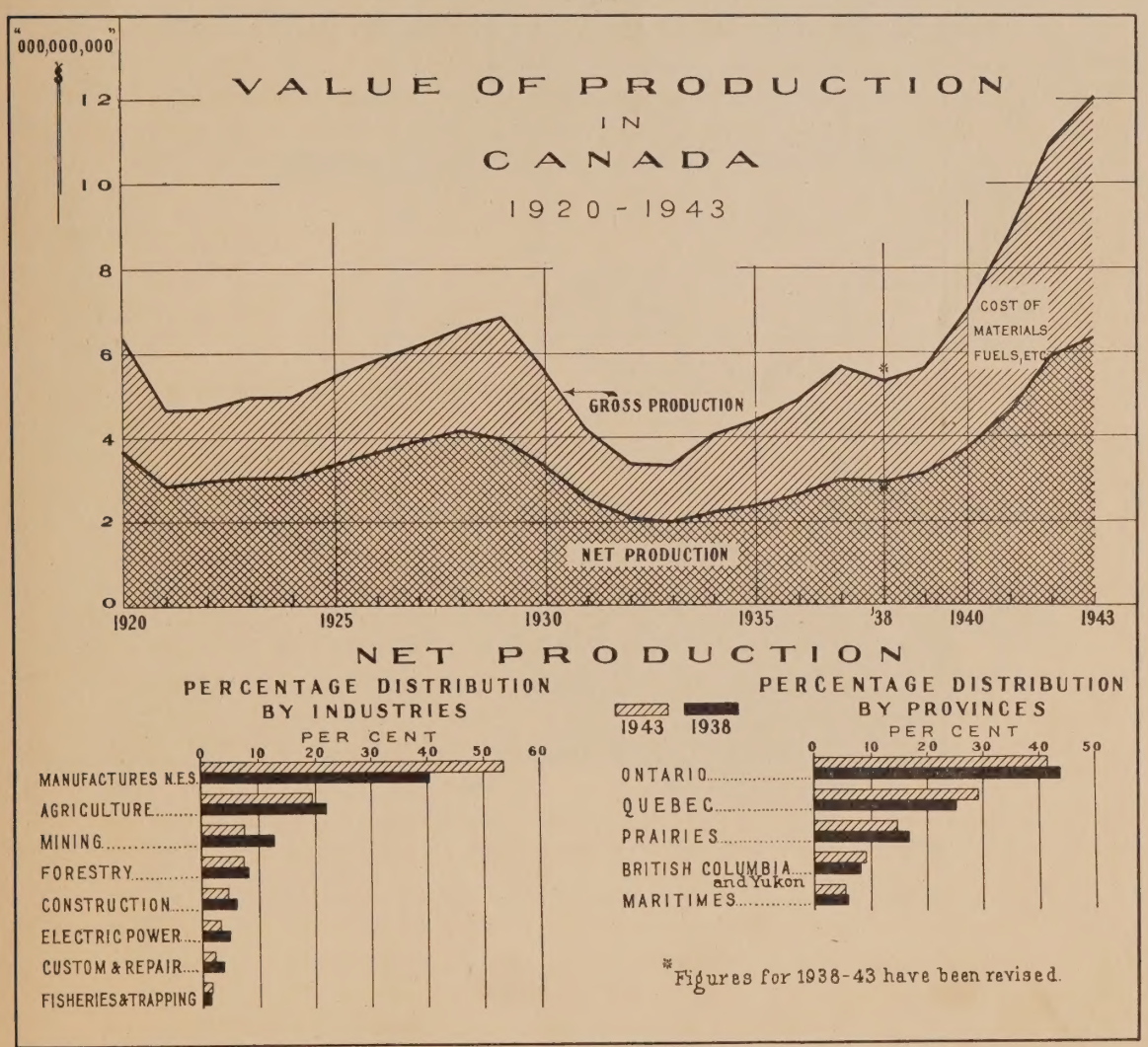
Survey of Total Production—An interesting insight into Canada's present-day economic and industrial development is provided by a study of the profound changes that have taken place in the nature and relationship of primary and secondary production during the present century. Prior to the War of 1914-18 a large proportion of Canadian exports was made up of raw and only partially manufactured goods whereas to-day the bulk of exports are fully manufactured.

1.—GROSS AND NET VALUES OF PRODUCTION IN CANADA, BY INDUSTRIES, 1942 AND 1943

NOTE—Net production represents total value under a particular heading, less the cost of materials, fuel, purchased electricity and process supplies consumed in the production process.

Industry	1942		1943		Percentage Change in Net Value, 1943 from 1942	Percentage of Net Value to Total Net Production 1943
	Gross	Net	Gross	Net		
	$	$	$	$	p.c.	p.c.
Agriculture	1,615,453,000[1]	1,351,606,000	1,524,379,000[1]	1,245,843,000	−7·82	19·70
Forestry	763,988,245	429,079,260	810,154,089	462,815,227	+7·86	7·32
Fisheries	103,118,177	64,821,702	118,610,634	74,655,678	+15·17	1·18
Trapping	23,801,213	23,801,213	21,579,615	21,579,615	−9·33	0·34
Mining	946,021,397[2]	514,109,951	974,414,921	475,529,364	−7·50	7·52
Electric power	203,835,365	200,345,240	204,801,508	200,833,297	+0·24	3·17
Totals, Primary Production	3,656,217,397	2,583,763,366	3,653,939,767	2,481,256,181	−3·97	39·23
Construction	635,649,570	310,917,190	572,426,551	293,538,167	−5·59	4·64
Custom and repair	208,379,000	141,395,000	213,622,000	144,952,000	+2·52	2·29
Manufactures[3]	7,553,794,972	3,309,973,758	8,732,860,999	3,816,413,541	+15·30	60·34
Totals, Secondary Production[4]	8,397,823,542	3,762,285,948	9,518,909,550	4,254,903,708	+13·09	67·27
Grand Totals	**10,982,803,173[5]**	**5,919,847,344[5]**	**12,023,952,501**	**6,325,458,373**	+6·85	**100·00**

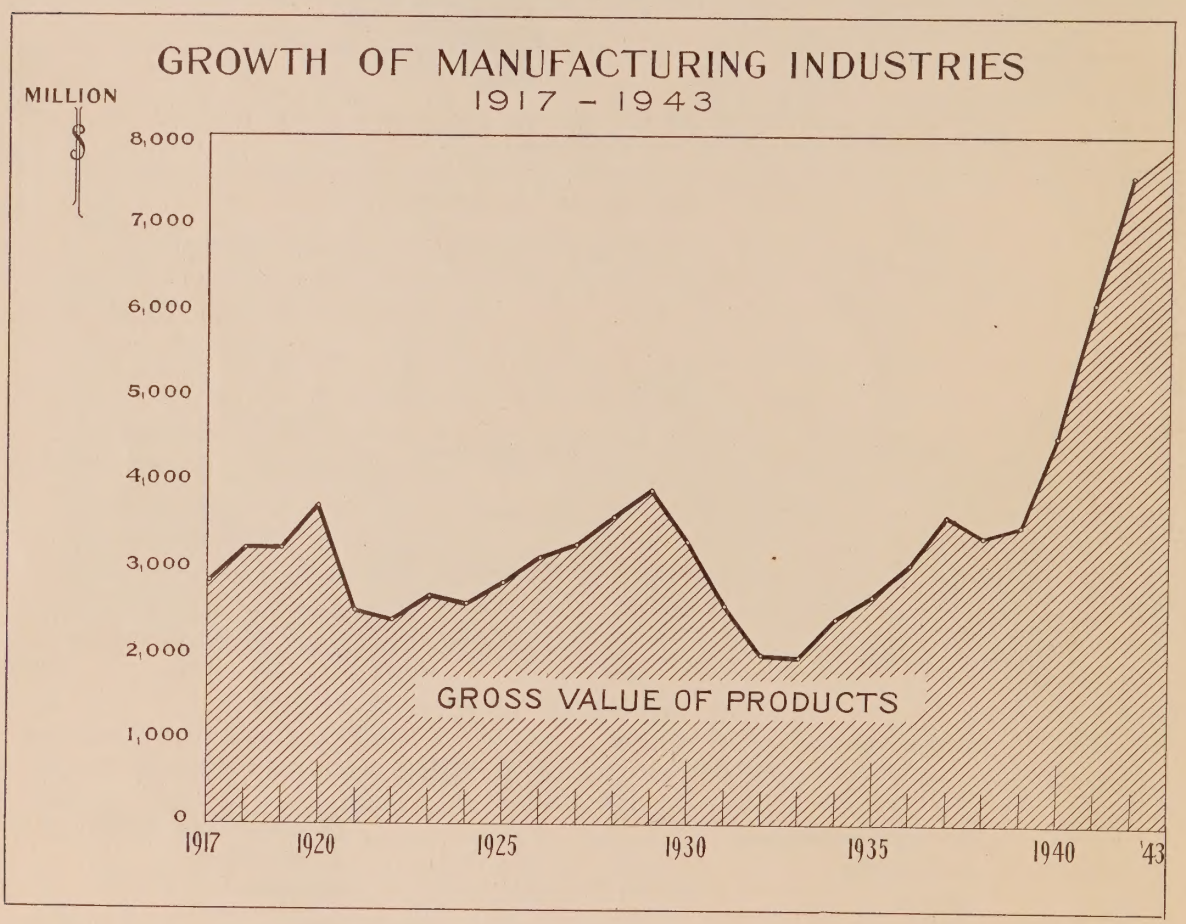
[1]Gross value represents cash sales, value of goods produced and consumed on farms with adjustments for grain and livestock inventories. [2]Gross value comprises industrial mineral production plus the value of ores, etc., of the smelting industry. [3]The item "Manufactures" includes sawmills, pulp and paper mills, etc., which are also included in other headings above. This duplication, amounting in 1942 to a gross of $1,071,237,766 and a net of $426,201,970, and in 1943 to a gross of $1,148,896,816 and a net of $410,701,516, is eliminated from the grand total. [4]Secondary production includes the above-mentioned duplication. The percentage of net manufactures, less duplication, to the total net production in 1943 was 53·8. [5]Revised since the publication of the 1945 Year Book.

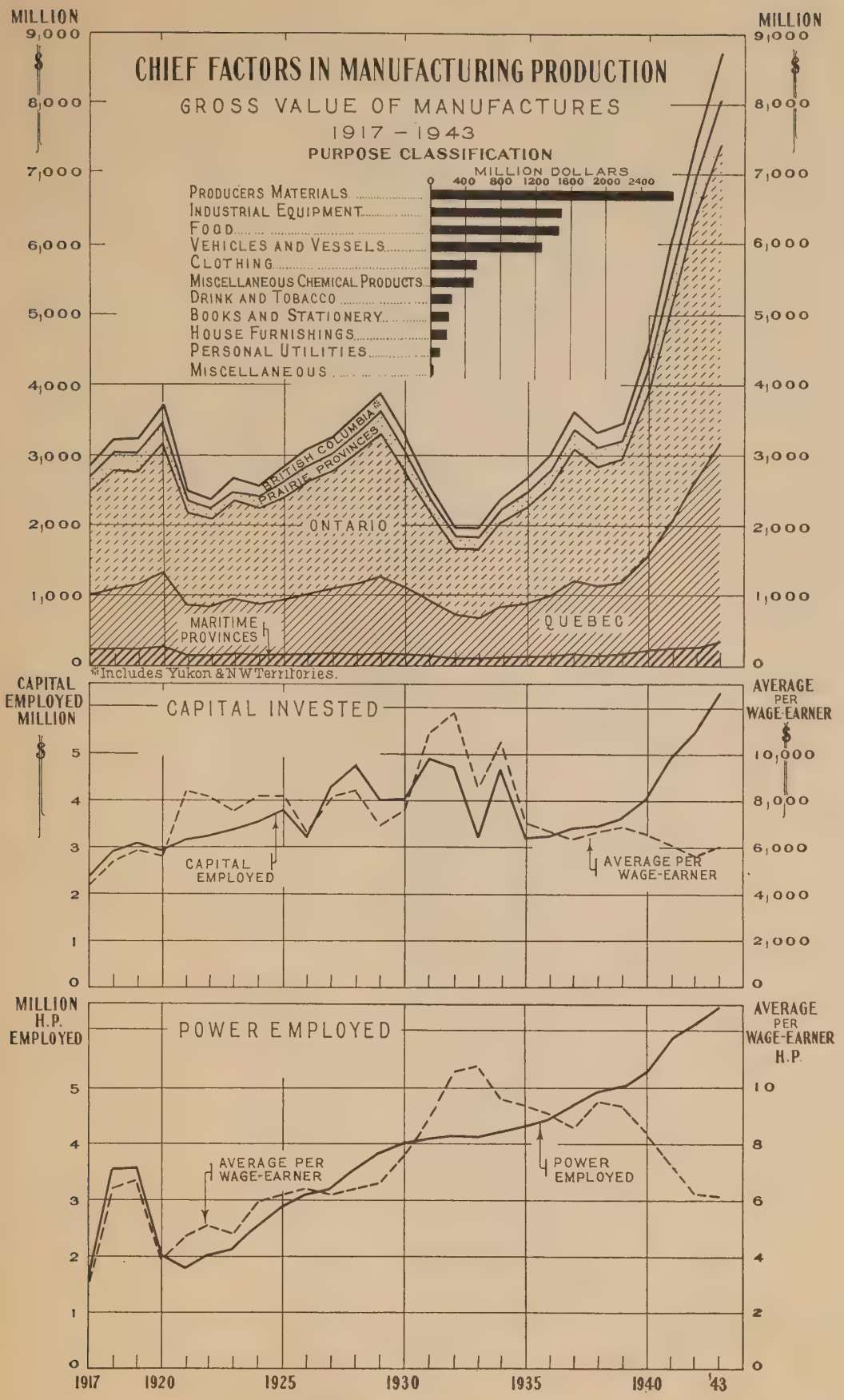


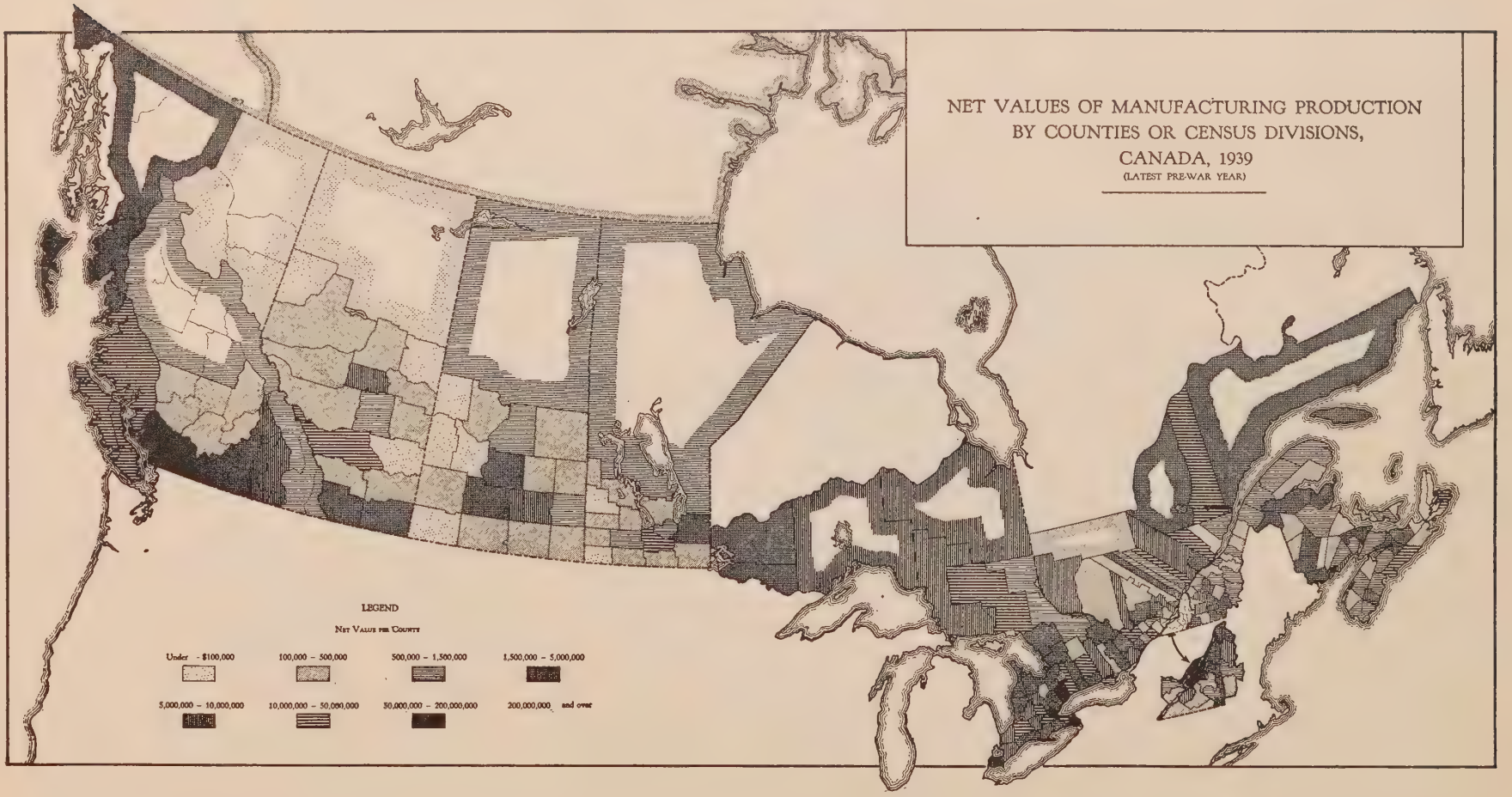
Reference to the table at top of page 5 shows that for the latest year secondary production, that is production of manufactured goods in Canada, accounted for 67.27 p.c. of all production; primary production accounted for 39.23 p.c.; 19.7 p.c. was provided by agriculture and approximately 7½ p.c. each by mining and forestry.

Compared with even so recent a year as 1938, the last complete pre-war year, the change has been very marked. In that year the percentage of secondary production to total production was 57.28 and primary production was 51.95 p.c. Agriculture in that year constituted 24.94 p.c. of primary production, mining 12.59 p.c. and forestry 8.22 p.c. while manufactures constituted all of secondary production.

The chart on page 5 shows Ontario is at present accountable for 41.45 p.c. of total net production and Ontario and Quebec together account for 71 p.c. Compared with 1938 the percentage of production provided by these two provinces has not materially changed, in other words the increase has been more or less uniformly distributed over all provinces. On a per capita basis of production, Ontario is in the lead by a considerable margin, the figures being $669.43 per capita in net value of production for Ontario compared with $627.87 for British Columbia; $534.68 for Quebec; $405.73 for Alberta; $393.74 for Manitoba; $396.02 for Saskatchewan; $309.05 for Nova Scotia; $288.98 for New Brunswick and $219.29 for Prince Edward Island.




CHIEF FACTORS IN MANUFACTURING PRODUCTION
GROSS VALUE OF MANUFACTURES
1917 – 1943
PURPOSE CLASSIFICATION
MILLION DOLLARS
0 400 800 1200 1600 2000 2400
PRODUCERS MATERIALS
INDUSTRIAL EQUIPMENT
FOOD
VEHICLES AND VESSELS
CLOTHING
MISCELLANEOUS CHEMICAL PRODUCTS
DRINK AND TOBACCO
BOOKS AND STATIONERY
HOUSE FURNISHINGS
PERSONAL UTILITIES
MISCELLANEOUS
MILLION $
9,000
8,000
7,000
6,000
5,000
4,000
3,000
2,000
1,000
0
BRITISH COLUMBIA*
PRAIRIE PROVINCES
ONTARIO
QUEBEC
MARITIME PROVINCES
*Includes Yukon & N.W. Territories.
CAPITAL EMPLOYED MILLION $
CAPITAL INVESTED
CAPITAL EMPLOYED
AVERAGE PER WAGE-EARNER
AVERAGE PER WAGE-EARNER $
10,000
8,000
6,000
4,000
2,000
MILLION H.P. EMPLOYED
POWER EMPLOYED
AVERAGE PER WAGE-EARNER
POWER EMPLOYED
AVERAGE PER WAGE-EARNER H.P.
10
8
6
4
2
1917
1920
1925
1930
1935
1940
'43

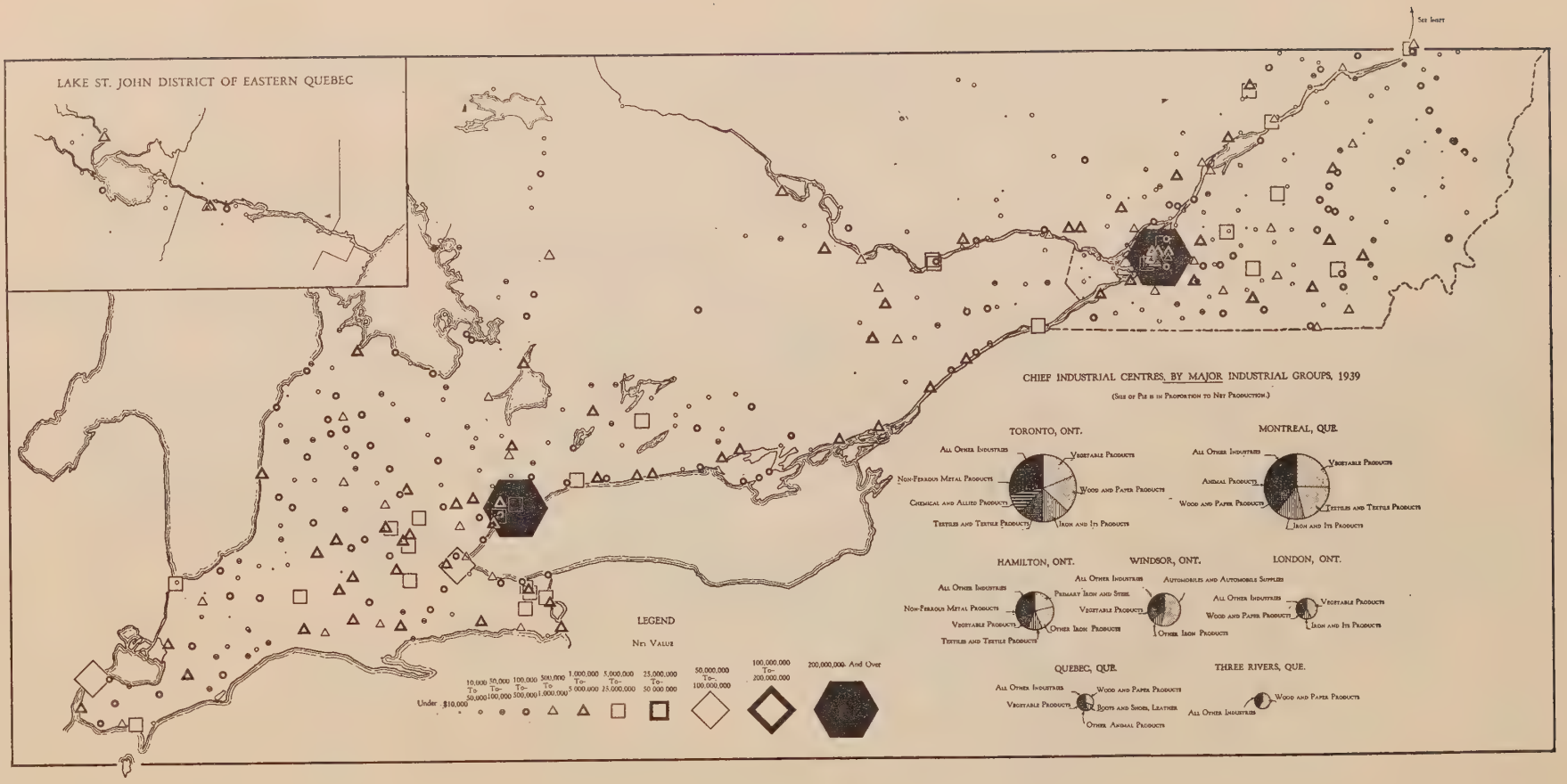


The above map shows for each County in Eastern Canada and for each Census Division in Western Canada the net value of manufacturing production for the year 1939. In interpreting the map certain points should be borne in mind. The relatively high productions for some of the counties in the northern areas of Ontario and Quebec, as compared with some of the counties to the south, are accounted for, first, by the size of the northern political units and also by the huge pulp and paper and secondary mining developments that are common to these areas. Nevertheless, as is well known, these northern areas are not industrialized in the same sense as the area along the St. Lawrence Valley for instance. They are primarily pioneering communities where mining and forestry are the two main industries, but these primary resources do give rise to certain secondary operations which are established on a large scale for economic reasons. Thus the pulp and paper mills of northern Ontario and Quebec are among the largest in the world as are the gold, nickel and base-metal mines and refineries. To indicate this difference and the spotty nature of such manufacturing, the areas in question are bordered with the pattern.

PRINCIPAL STATISTICS OF THE FORTY LEADING INDUSTRIES OF CANADA

RANKED ACCORDING TO GROSS VALUE OF PRODUCTS, 1943

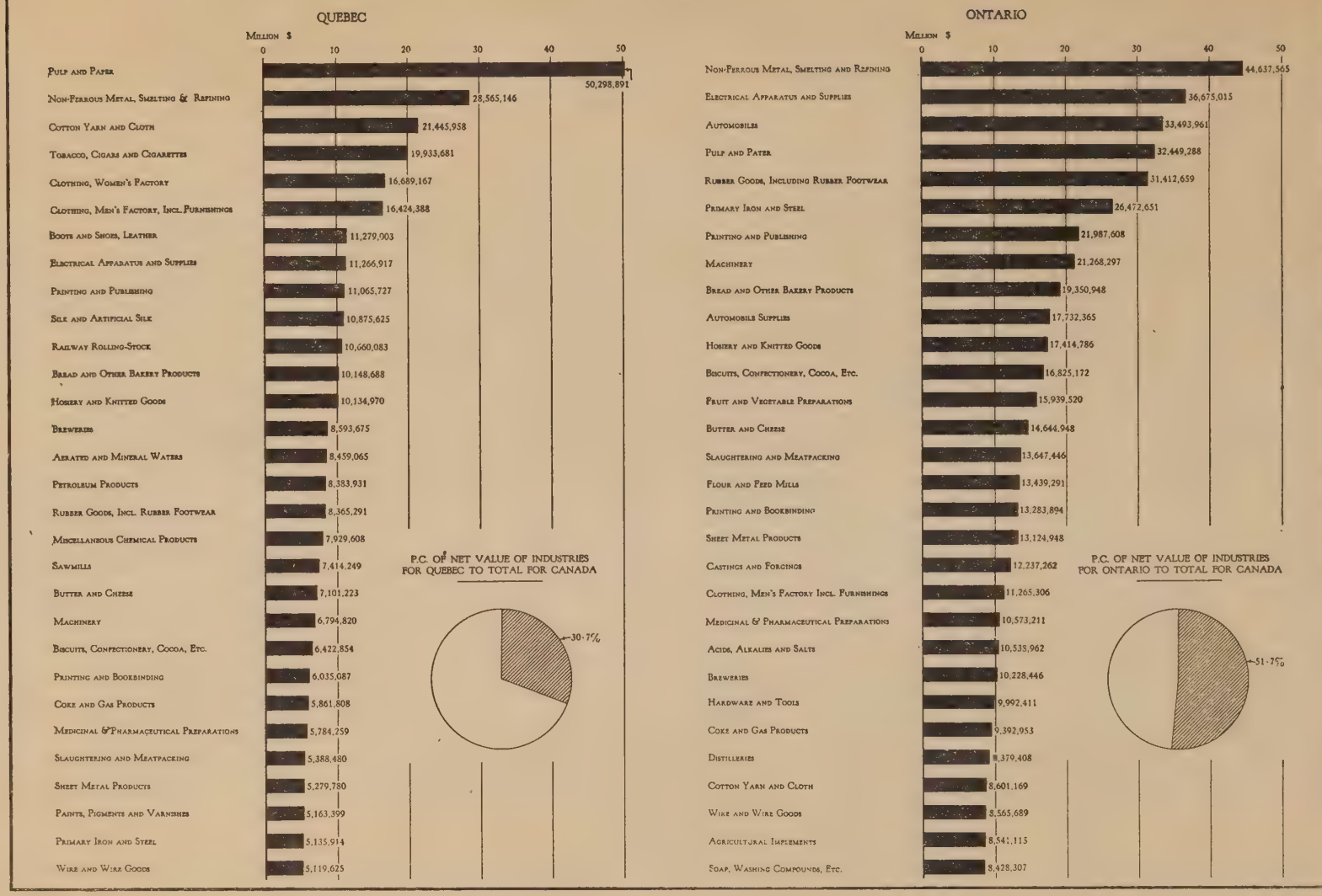
	Industry	Establishments	Capital	Employees	Salaries and Wages	Cost of Materials	Value of Products	
							Net	Gross
		No.	$	No.	$	$	$	$
1	Non-ferrous metal smelting and refining	16	392,217,159	26,749	48,491,732	356,251,255	111,857,020	511,213,376
2	Miscellaneous chemical products	200	505,359,005	61,428	94,496,031	242,940,411	234,521,138	482,660,017
3	Slaughtering and meat packing	153	102,948,528	18,775	29,994,640	382,284,793	52,460,664	437,228,577
4	Shipbuilding and repairs	87	241,992,825	75,847	153,595,336	123,317,336	249,815,120	376,560,974
5	Iron and steel products, n.e.s.	161	276,501,433	48,567	95,810,305	181,658,309	179,745,001	364,698,074
6	Automobiles	5	139,610,450	24,265	57,569,265	248,652,602	101,349,626	352,229,955
7	Pulp and paper	106	667,458,143	37,020	71,199,422	143,956,462	165,485,944	345,653,470
8	Aircraft	45	228,616,099	69,529	126,826,708	70,448,010	173,831,155	246,028,586
9	Electrical apparatus and supplies	223	161,260,825	46,928	76,906,994	109,281,060	134,049,332	245,770,859
10	Primary iron and steel	63	235,386,238	34,222	65,654,468	101,413,794	103,552,130	223,951,059
11	Butter and cheese	2,314	72,237,363	19,181	23,836,366	166,881,687	45,318,999	215,771,404
12	Flour and feed mills	1,131	70,869,815	7,163	10,015,738	169,488,522	29,726,569	201,127,291
13	Sawmills	5,140	115,273,788	43,954	49,564,303	101,021,760	91,714,000	195,885,336
14	Brass and copper products	158	73,747,578	21,899	40,731,201	108,330,435	81,403,059	192,987,718
15	Petroleum products	52	90,196,659	6,085	12,748,732	138,159,884	40,705,482	187,106,054
16	Automobile supplies	101	78,194,016	21,631	40,328,567	89,986,643	82,884,770	175,074,983
17	Railway rolling-stock	34	125,160,005	30,495	59,442,679	83,069,419	72,079,328	159,156,587
18	Machinery	256	123,621,515	28,239	52,818,044	48,685,844	101,874,475	152,359,576
19	Clothing, men's factory	410	60,916,655	30,885	37,267,075	91,554,837	57,782,196	149,800,112
20	Rubber goods (incl. footwear)	51	73,550,768	15,913	25,342,508	68,297,492	59,952,041	130,157,780
21	Cotton yarn and cloth	40	85,060,925	23,526	28,146,211	80,663,290	43,121,043	126,879,874
22	Clothing, women's factory	781	44,299,242	25,752	32,385,477	69,264,831	55,271,412	124,837,789
23	Bread and other bakery products	2,996	57,067,417	26,829	32,891,060	56,951,269	59,543,244	120,445,625
24	Sheet metal products	191	77,846,582	16,955	26,577,908	48,922,922	46,760,657	96,923,991
25	Hardware, tools and cutlery	241	62,873,901	19,228	33,222,087	24,233,712	65,715,287	91,296,033
26	Biscuits, confectionery, cocoa, etc.	211	45,319,223	13,469	16,038,887	39,346,522	39,833,554	80,261,546
27	Hosiery and knitted goods	191	58,023,438	22,344	23,849,986	38,532,495	40,504,777	80,209,219
28	Acids, alkalies and salts	38	102,927,307	8,045	15,057,723	27,714,019	42,142,717	78,359,453
29	Printing and publishing	771	57,725,311	17,963	29,724,389	16,368,501	58,785,596	76,054,227
30	Boots and shoes, leather	222	34,873,991	18,665	21,677,798	42,648,779	32,536,365	75,583,954
31	Castings, iron	198	60,193,907	15,916	28,727,856	26,677,705	46,386,822	75,479,138
32	Scientific and professional equipment	46	63,633,603	10,206	18,739,957	48,383,410	24,320,313	73,101,627
33	Miscellaneous food industries	259	38,991,544	5,792	7,744,697	50,194,167	22,082,845	72,798,428
34	Bridges and structural steel	22	39,458,775	10,974	23,175,872	24,014,652	47,495,665	72,515,834
35	Fruit and vegetable preparations	382	60,753,837	11,894	12,350,468	44,564,481	26,298,614	72,228,697
36	Breweries	61	71,607,123	6,613	12,852,096	15,918,326	52,493,557	69,658,808
37	Fish-curing and packing	523	30,741,194	8,621	9,137,089	43,366,785	20,588,039	64,804,969
38	Tobacco, cigars and cigarettes	70	78,331,842	10,805	12,084,381	31,476,712	32,353,003	64,091,935
39	Planing mills, sash and door factories	827	42,184,892	13,417	17,168,938	34,864,939	27,658,085	63,418,426
40	Coke and gas products	33	109,465,222	4,381	7,955,598	32,434,667	23,387,021	60,900,598
	Totals, Forty Leading Industries	**18,809**	**5,056,498,143**	**960,170**	**1,582,148,592**	**3,822,222,739**	**2,977,386,665**	**6,985,271,959**
	Totals, All Industries	**27,652**	**6,317,166,727**	**1,241,068**	**1,987,292,384**	**4,700,493,083**	**3,806,413,541**	**8,732,860,999**
	Percentages to all industries	68·0	80·0	77·4	79·6	81·3	78·2	80·0



The Distribution of Industry in the St. Lawrence - Great Lakes Area — The St. Lawrence-Great Lakes Area of Ontario and Quebec is pre-eminently the industrial area of Canada. The above map shows the location and importance of the chief industrial centres in this area. In order to represent the relative importance of the various centres, symbols have had to be used in place of the usual discs or circles. The value of the symbol lies in the emphasis on design instead of proportionate size (as would be shown by circles or discs). It would be impossible to cover the wide range of net values by proportionate discs.

Inset in the map are shown discs of the main manufacturing cities in proportion as to net value of production and subdivided by major industrial groups.

NET VALUE OF THIRTY LEADING INDUSTRIES, 1939



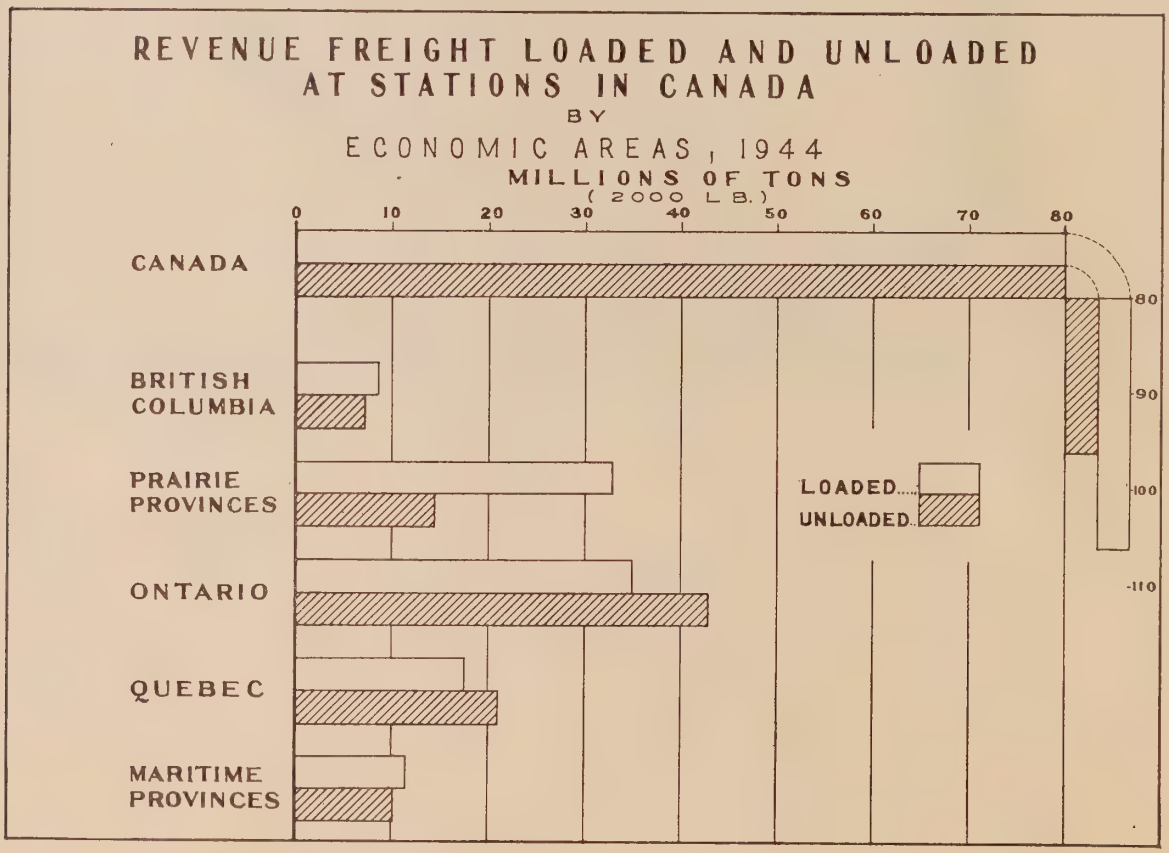
THE CANADIAN MARKET

THE DOMESTIC MARKET

The extent and diverse resources of Canada lead to a vast exchange of products and the task of placing goods and services where they are required for consumption or use accounts for a great expenditure of economic effort. Because there are no interprovincial barriers, statistics are difficult to obtain. The most reliable are probably the loadings and unloadings of freight carried by the railways. Summary information of this type is charted below.

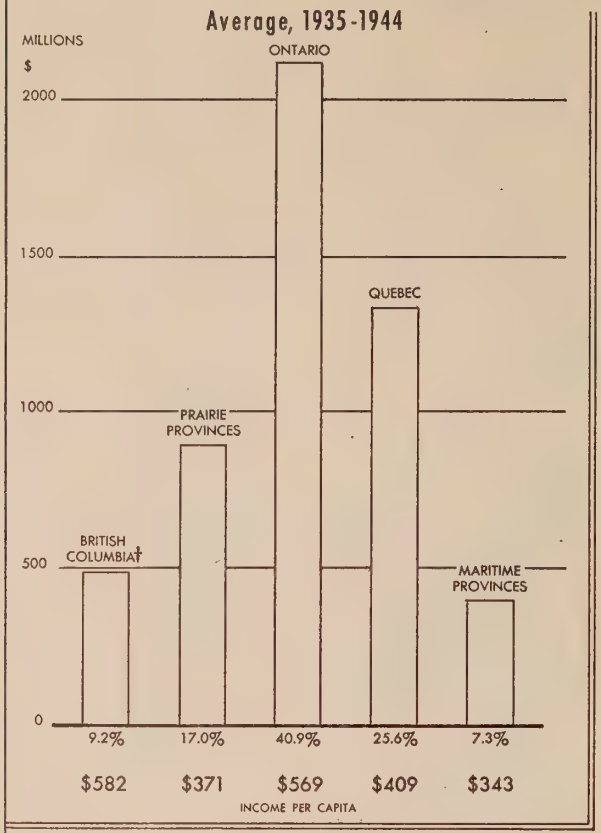
The domestic market is made up on the one hand of purchasers of producer or capital goods and on the other of consumer requirements. The market for consumer goods is of primary interest: it consists of individuals, families or households having purchasing power and either real or potential desire to buy. Information on such markets centres around the basic question of distribution of population (see map page 13), and on a number of factors which determine the actual and potential demands for goods and services. Among these, the personal characteristics of the people, their economic status, the types of communities, the industries upon which they are dependent, their buying habits are among the most important from the standpoint of market appraisal.

It is, of course, impossible to go into these different factors here, but a chart is presented on page 14 that shows the income of economic areas by bars of varying lengths. Percentage discs show how the income is earned. Ontario provides by far the most important market within Canada. This is not only due to her greater population but to her wealth in industrial plant equipment and natural resources, which support a high average standard of living.



Distribution of Population, 1941—In interpreting the above map certain points should be noted. Since a dot is taken as the unit and represents 1,000 people, it is not an easy matter to depict the heavy clustrations of population in the densely settled portions of Canada along the St. Lawrence Valley. Two methods of showing the large urban concentrations are used. In the case of the twelve greater cities, discs are used since by this means the heavy populations of those cities do not interfere with the surrounding populations shown by dots. Great care must be taken, however, in interpreting the map to recognize that the discs though shown only with light shading in order not to interfere with the reading of the map should be visualized as solid black areas, superimposed on the other dot distribution. Urban centres other than the greater cities are shown by clustrations of dots.

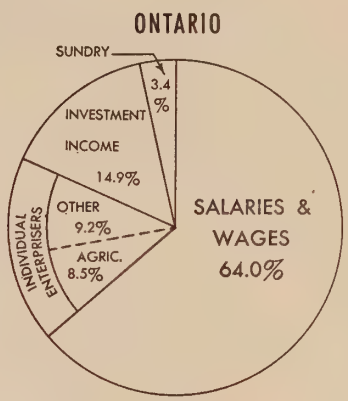
INCOME OF THE PEOPLE*

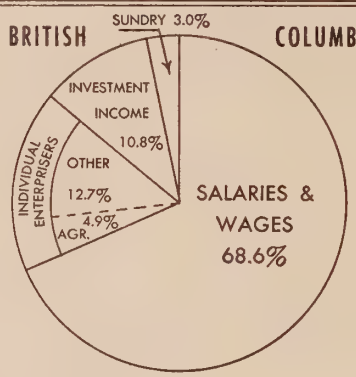


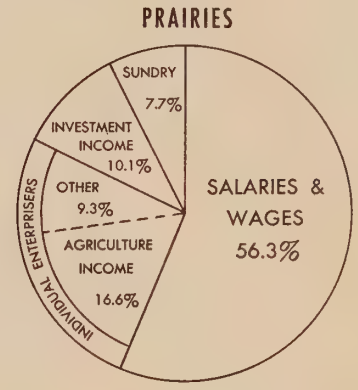
PERCENTAGE DISTRIBUTION

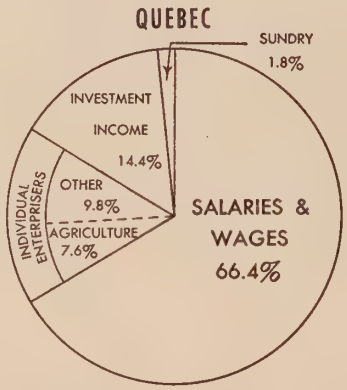
ACCORDING TO TYPE OF EARNINGS

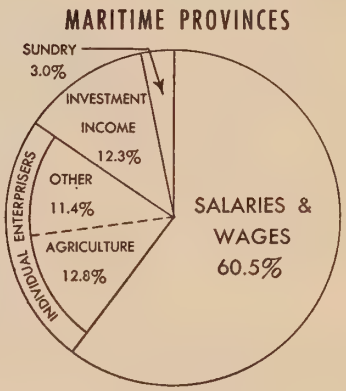
BASED ON PERIOD 1929-1938





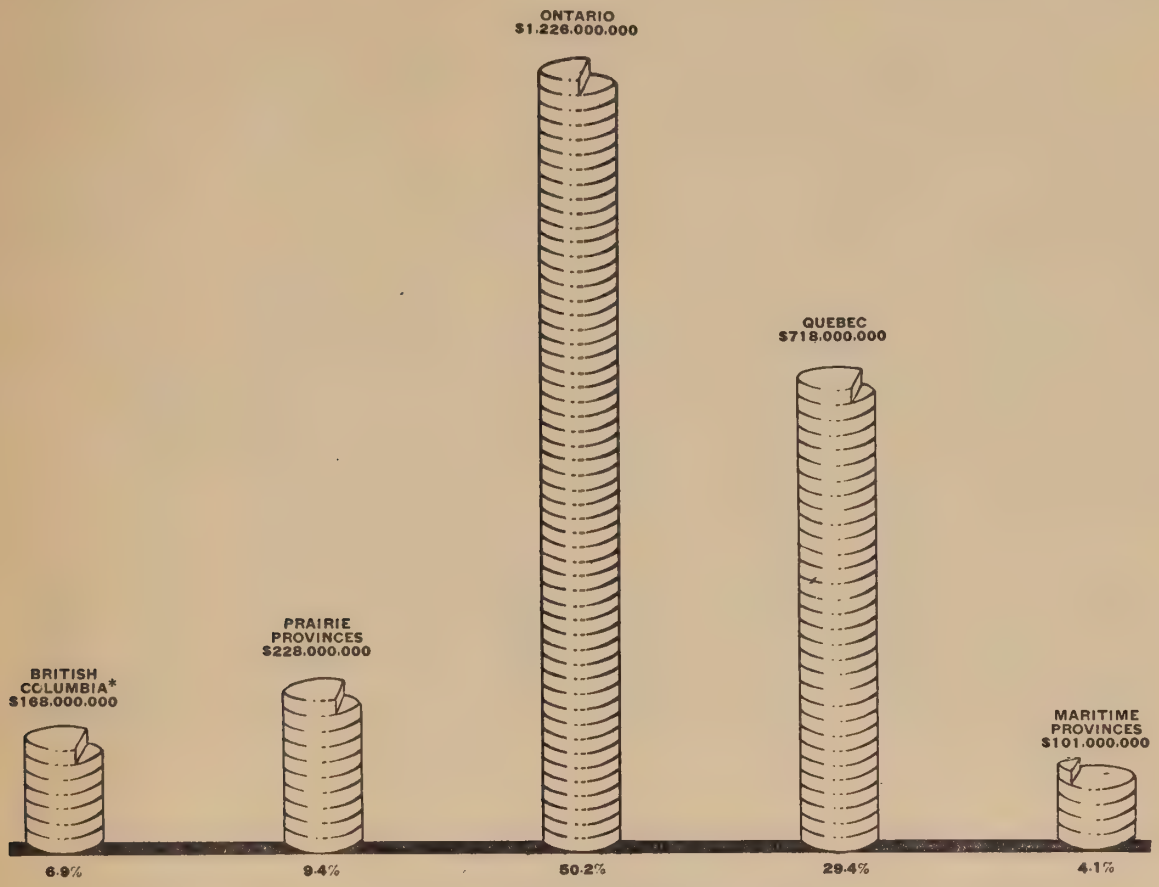






The estimate omits certain non-monetary income and undistributed profits.
†*Includes Yukon and Northwest Territories.*

PURCHASES BY INDUSTRY



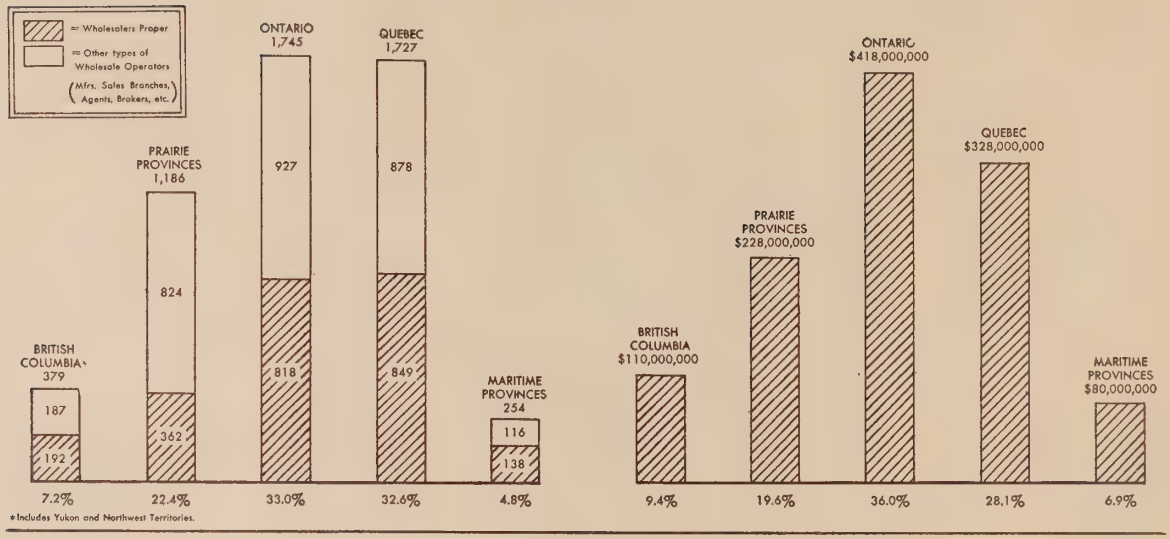
(Thousands of Dollars)

	Yukon and Northwest Territories	British Columbia	Prairie Provinces	Ontario	Quebec	Maritime Provinces	Canada
1934		88,145*	119,152	609,875	357,367	54,975	1,229,514
1935		105,662*	138,506	717,863	398,111	59,005	1,419,147
1936		121,362*	157,369	822,884	455,028	67,571	1,624,214
1937		144,466*	187,366	1,025,872	562,889	86,333	2,006,926
1938		127,196*	178,231	909,959	518,431	73,661	1,807,478
1939	139	136,656	174,342	907,011	536,823	81,189	1,836,160
1940	97	170,358	217,777	1,236,739	713,133	111,618	2,449,722
1941	129	219,756	292,344	1,683,912	961,162	139,243	3,296,546
1942	139	270,823	361,074	2,056,747	1,193,445	154,874	4,037,102
1943	138	294,445	453,715	2,288,872	1,483,628	179,695	4,700,493

**Includes Yukon and Northwest Territories.*

Sales by all Types of Wholesale Operators, 1941 (Millions of Dollars)

Sales by Wholesalers Proper Ten-Year Average 1930-39



SALES BY ALL TYPES OF WHOLESALE OPERATORS — CALENDAR YEAR 1941

(Thousands of Dollars)

	British Columbia*	Prairie Provinces	Ontario	Quebec	Maritime Provinces
Wholesalers Proper	191,570	362,295	817,787	849,061	137,763
Manufacturers' Sales Branches and Offices	71,781	142,179	478,550	452,369	82,099
Agents and Brokers	77,628	310,427	207,595	291,885	
Other Wholesale Operators	38,331	371,371	240,732	133,206	34,122
	379,310	1,186,272	1,744,664	1,176,521	253,984

**Includes Yukon and Northwest Territories.*

Wholesale Trade—Wholesale trade includes a wide variety of types of business acting as intermediaries in the field of distribution. It includes agents, brokers, commission merchants, etc., as well as wholesale merchants proper who buy in bulk from the producer and sell in smaller lots to the retail trader. The Census of Merchandising Establishments in Canada is taken in conjunction with the decennial censuses. In 1941 when the census was last taken there were almost 25,000 wholesale establishments employing 94,627 males and 22,844 females to whom $189,449,000 were paid in salaries and wages. There were also 13,656 proprietors working on their own account. Aggregate sales of these wholesalers amounted to $5,290,751,000 of which $1,012,409,000 represented sales made on commission for others. Since such commission sales as well as sales made by some assemblers of primary products are to a considerable extent duplicated in the total figures, this fact should be considered in interpreting the data. Of the $4,278,342,000 which

represents the total aggregate sales less such duplication, Ontario accounted for $1,514,622,000 or 35.4 p.c.; Quebec for $1,414,324,000 or 33.1 p.c.; Manitoba was in third place with $318,643,000 or 7.4 p.c. Of this total what may be termed wholesalers proper account for $2,315,882,000 the balance being made up by sales made by manufacturers' sales branches and offices, petroleum bulk tank stations, assemblers of primary products and other types of operation.

This wholesale trade is concentrated in a few large urban centres of which Montreal leads with total sales of $1,448,809,000 and Toronto second with $1,136,039,000, Winnipeg with $494,227,000 and Vancouver with $304,267,000. Almost one-half of the total wholesale trade was transacted in the two great distributing centres of Montreal and Toronto. These two cities together with Winnipeg and Vancouver transacted 64 p.c. of the total wholesale trade.

The major lines of business in which wholesale trade flourishes are food products including groceries with 2,359 establishments which accounts for 20.5 p.c. of the total wholesale trade and 46.0 p.c. of the sales of wholesalers proper; machinery, equipment and supplies except electrical with 955 establishments accounts for 3.9 p.c. of the total wholesale trade and 8.8 p.c. of the sales of wholesalers proper; tobacco and tobacco products except leaf with 459 establishments accounts for 3.2 p.c. of the total wholesale trade and 7.1 p.c. of the sales of wholesalers proper; farm products (raw materials) with 305 establishments accounts for 2.8 p.c. of the total of wholesale trade and 6.3 p.c. of the sales of wholesalers proper.

It will be observed that all these groups are classed among the wholesalers proper. Generally speaking from the nature of their business they maintain a higher proportion of outlets or establishments than do other operators not classed as wholesalers proper. This follows from the nature of their operations and is particularly true in the cases of wholesalers of waste materials, dry goods and apparel, and automotive equipment.

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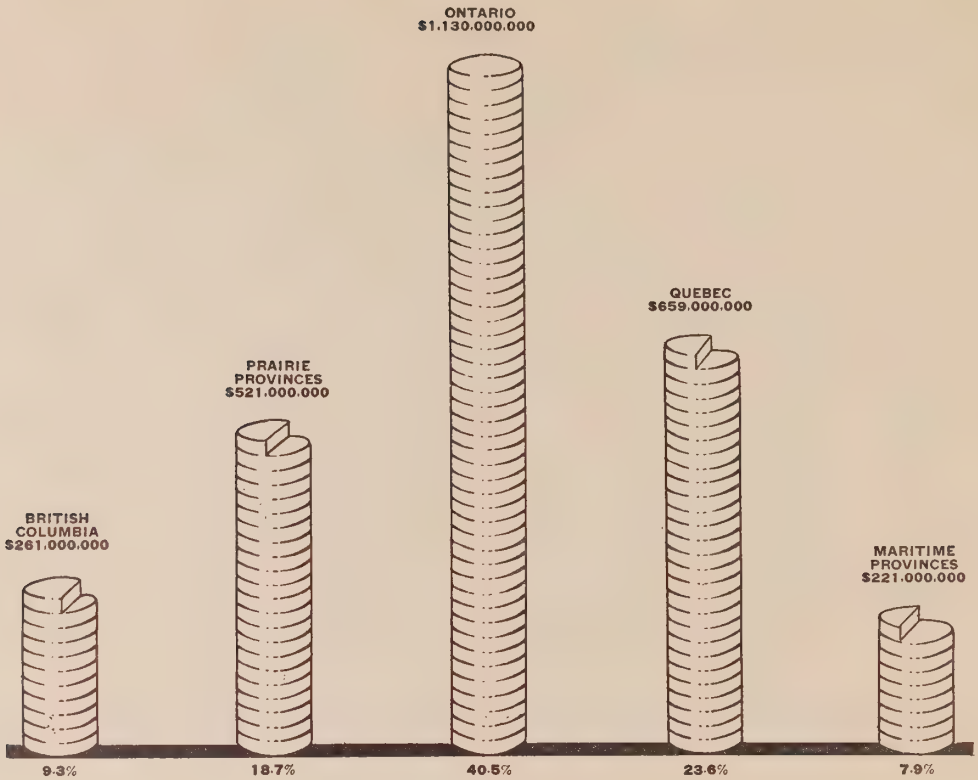
SALES BY WHOLESALERS PROPER

(Thousands of Dollars)

Calendar Year	British Columbia	Prairie Provinces	Ontario	Quebec	Maritime Provinces
1930	131,414	288,503	471,618	386,229	92,302
1931	107,612	210,683	397,832	323,269	78,968
1932	85,102	188,212	334,559	267,905	64,880
1933	83,418	174,888	324,828	254,696	62,666
1934	94,131	195,416	374,288	288,417	71,044
1935	102,171	211,741	392,730	299,999	74,101
1936	111,532	230,288	431,477	327,034	81,212
1937	127,720	250,228	495,682	386,953	91,629
1938	123,239	257,621	468,781	359,637	86,691
1939	131,748	274,187	492,124	381,767	95,724

RETAIL SALES

Retail Trade—By far the greatest proportion of retail merchandise trade is of course transacted through retail stores. Out of a total retail merchandise trade for 1941 of $3,667,715,600 or an average of $319 per capita, $3,354,499,100 represents retail merchandising sales through retail stores. The balance included such establishments as hotels, retail distributors of itinerant operators and persons carrying on retail business as a minor activity.



Ontario accounts for 40.9 p.c. of total sales at retail; Quebec 23.8 p.c.; British Columbia is in third place with 9.0 p.c.; Alberta in fourth place with 6.4 p.c.; and Manitoba comes next with 6.1 p.c.

Between 1930 and 1941 it is estimated that there was a gain of 25.6 p.c. in dollar sales but the War in spite of all the controls placed upon retail merchandising sales has undoubtedly increased the dollar value of sales still further. An outstanding development during recent years has been the marked increase in chain and combination store trade.

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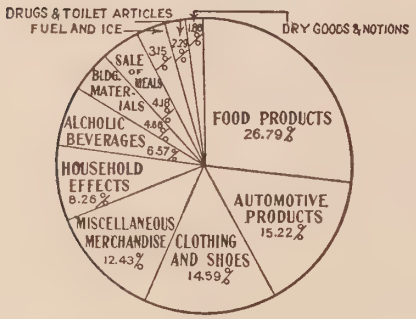
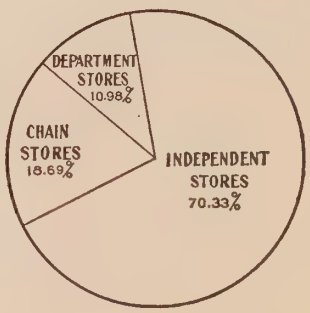
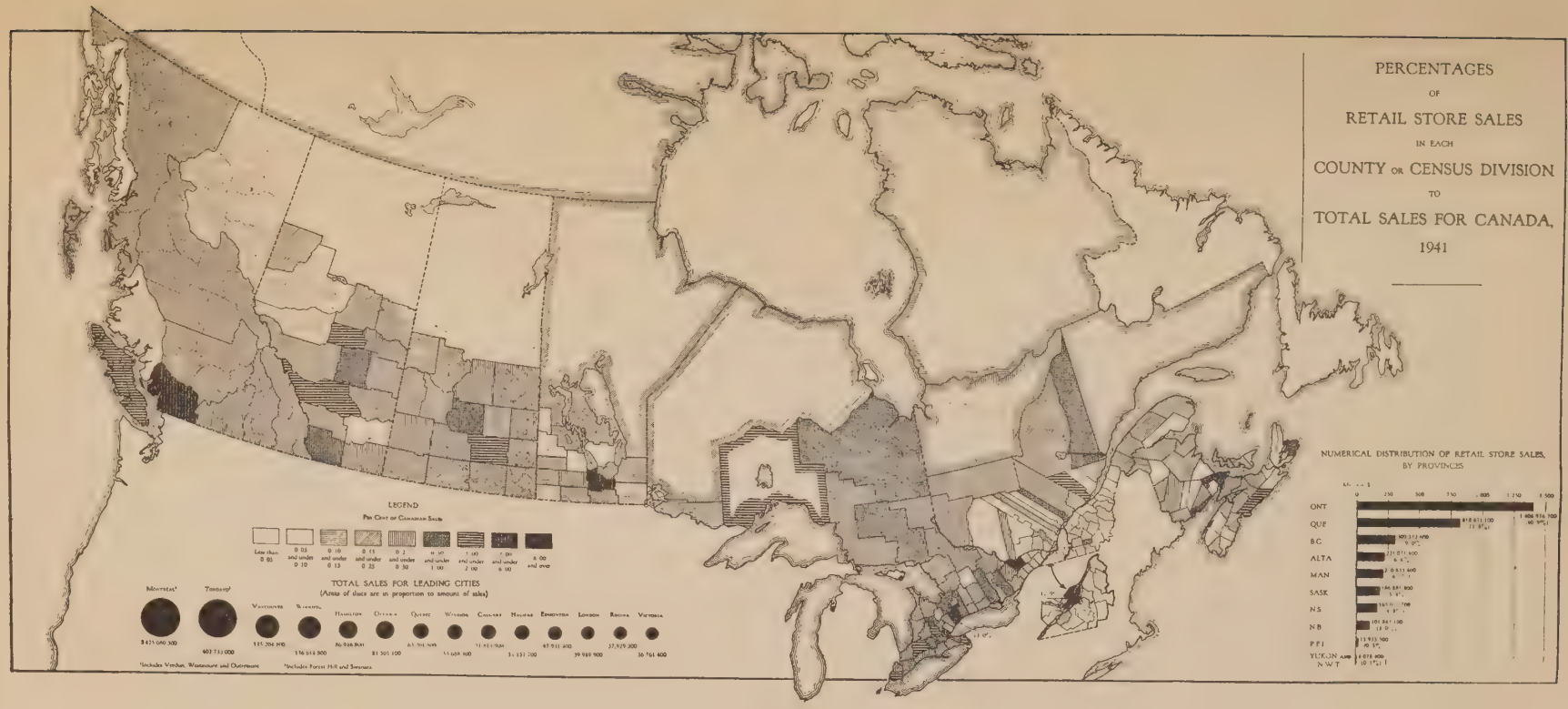
DISTRIBUTION OF CONSUMER DOLLAR, BY COMMODITY CLASSES AND RETAIL SALES BY INDEPENDENT, CHAIN AND DEPARTMENT STORES, 1941







Retail Store Sales—The figures upon which the above map is based show a wide variation for different centres, especially in the relationship between population and retail sales and it is difficult to interpret the map correctly without taking into account the urban distribution of retail trade and the fact that such urban places are the distributing centres for very wide areas, often beyond the county or census division in which they fall. There is no doubt for instance that the census division containing Winnipeg which shows a relatively high percentage of sales owes its position to its function as a distributing centre for Western Canada. The same is more or less true for the census divisions containing Regina, Calgary, Edmonton and Vancouver. The map from its very nature does not indicate the preponderating importance in retail sales of those eastern counties which contain metropolitan centres like Montreal and Toronto. For this reason the insets showing total sa es by provinces and for leading cities are given. In interpreting the data for leading cities the point formerly made that mail-order sales and other sales made in an urban centre very often includes business obtained from outlying areas even in other provinces. This procedure has the effect of inflating the figures for those cities.

RETAIL SALES

(Thousands of Dollars)

	British Columbia	Prairie Provinces	Ontario	Quebec	Maritime Provinces	Canada*
1934	178,286	373,216	839,167	457,133	147,396	1,997,286
1935	198,740	402,404	880,949	476,757	157,640	2,118,687
1936	224,575	438,104	946,401	522,242	170,393	2,303,684
1937	253,913	468,704	1,073,587	609,678	199,862	2,608,163
1938	239,470	479,649	1,030,203	602,723	189,201	2,543,660
1939	241,677	501,694	1,044,110	607,064	196,406	2,593,138
1940	272,273	556,608	1,194,525	688,071	235,924	2,949,579
1941	309,574	618,790	1,406,977	818,671	282,813	3,440,902
1942	337,690	655,549	1,438,010	891,916	304,507	3,632,952
1943	350,584	710,895	1,443,622	916,132	325,329	3,753,874

**Includes sales in Yukon and Northwest Territories.*

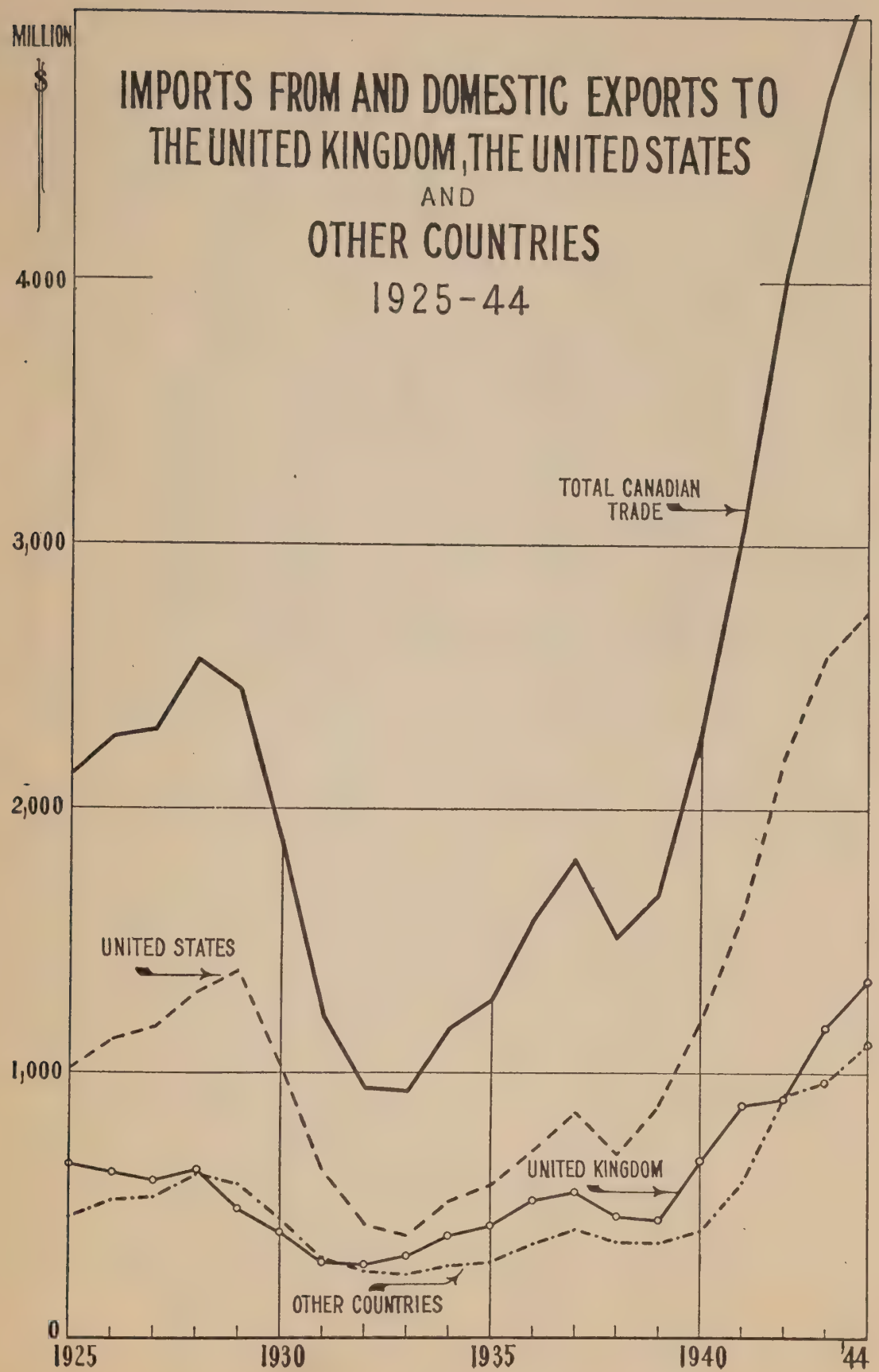
THE EXTERNAL MARKET

The External Market — Canada, as a leading exporting nation in the world to-day (the second during 1945) depends in large degree on export markets for her prosperity and the maintenance of her standard of living.

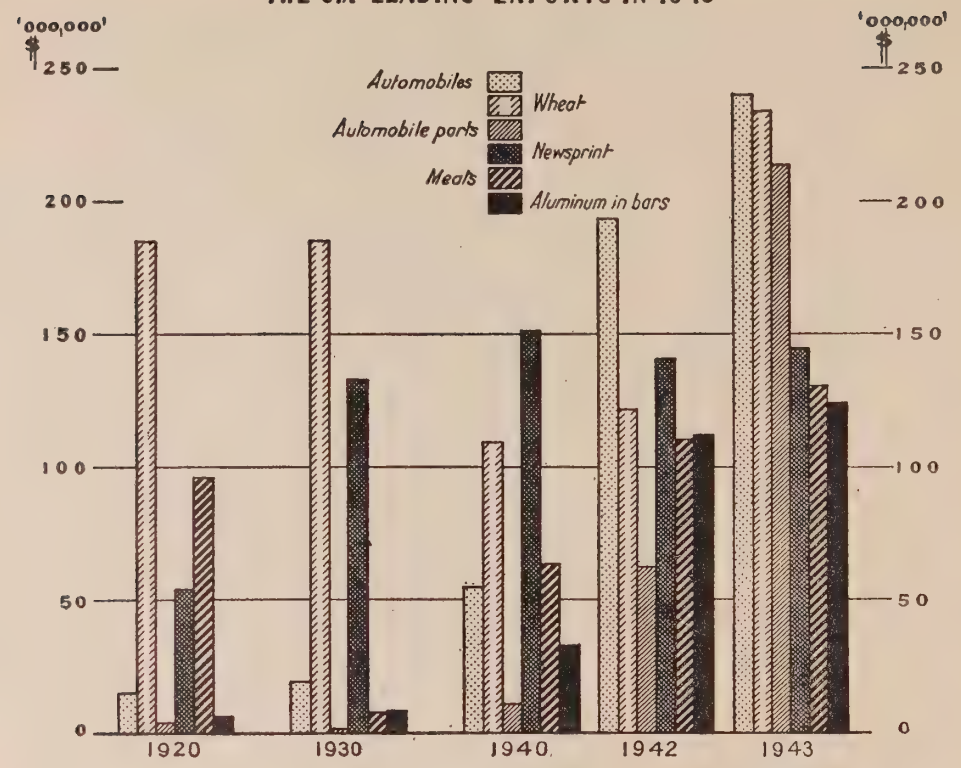
Historically, Canada's great customer has been the United Kingdom and Canada has bought a large proportion of her imports from the United States. This situation maintained until the outbreak of war in 1939. The tremendous increase in the volume of British purchases in Canada during the War, especially in food products of all kinds and munitions of war, together with the sharp expansion of trade with the United States and the barriers that existed to trade with European and non-belligerent countries have altogether changed the normal peacetime relationships of Canadian markets and given rise to a situation that, now the War is over, will call for readjustment. On the other hand the increased volume of industrial activity that accompanied the War, and the enhanced national income and accumulated savings of the masses of the people, reflect a pent-up demand for consumer goods of all kinds that will ease the severity of such adjustments as have to be made as a result of the changes in the purchasing position of the United Kingdom and the break-down of the pre-war triangular trading relationship between Canada, the United Kingdom and the United States.

During the years prior to the War, Canada built up substantial goodwill in the countries of Central and South America and there is every reason to think that trade with these areas can be built up to many times its pre-war volume. European countries like France, Belgium and the Netherlands should also be in a position to help constructively and within a reasonable time to the building up of world trade. Canada can look forward to her share of these markets. There is sound reason to think that Canadian commodities will be required in the world economy to a greater extent than before the War: the policy of export credits together with the initiative and resource of the Department of Trade and Commerce, working through its Trade Commissioners, should bring a fair share of such trade to the Dominion.

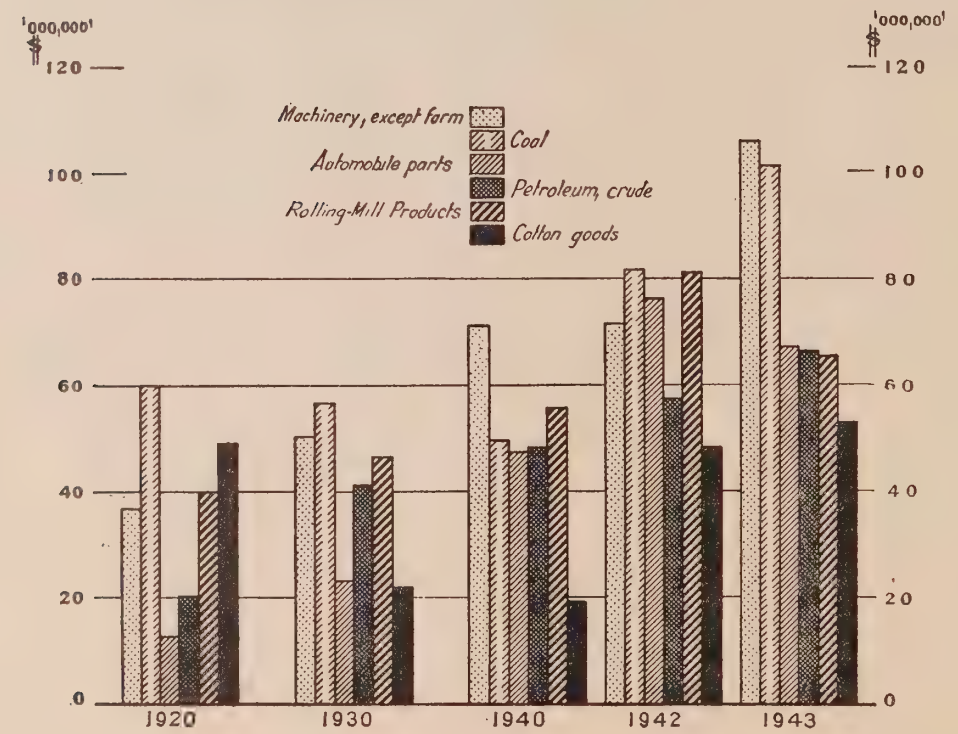
In view of the prospective increased imports of consumer goods from the United States, trade with South America, Europe and other countries will be an important contributing factor in alleviating current-account deficits with the United States.

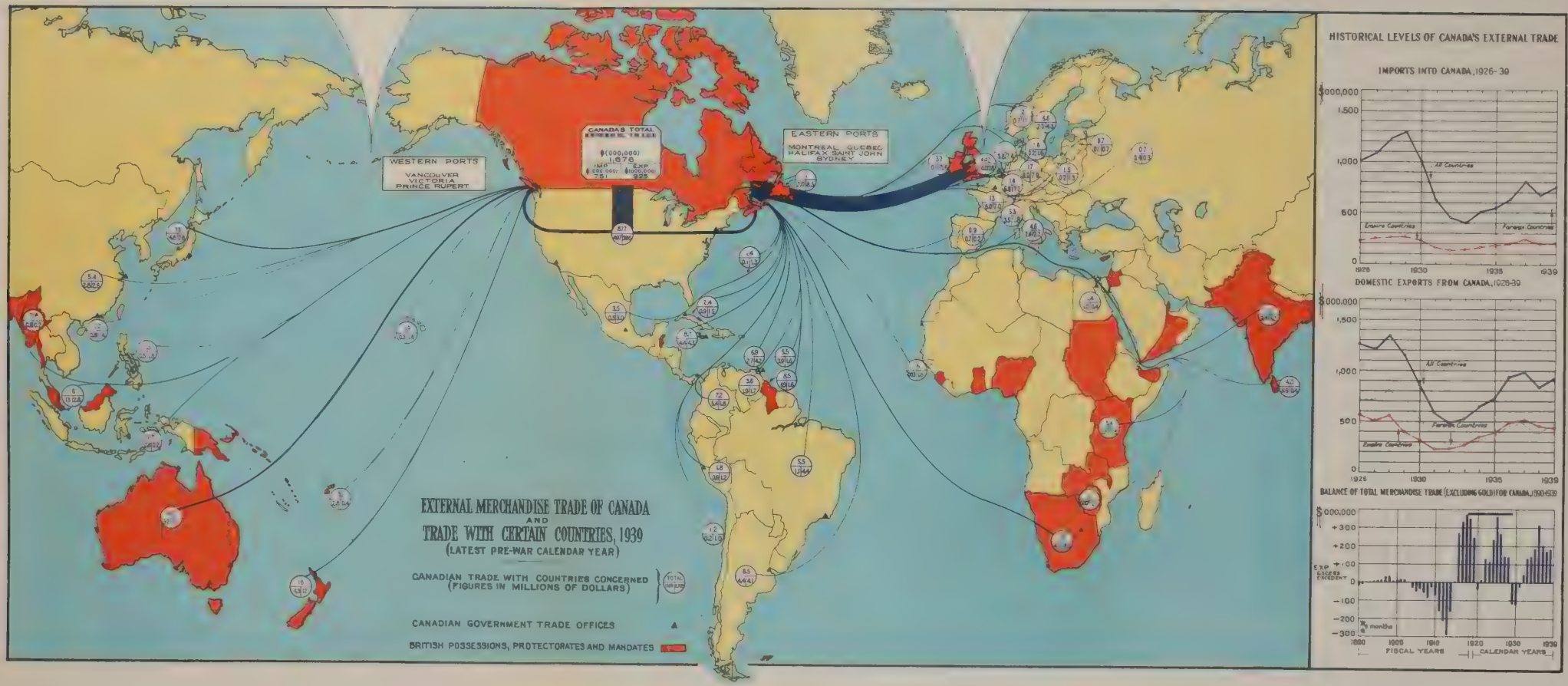

MILLION
$
IMPORTS FROM AND DOMESTIC EXPORTS TO
THE UNITED KINGDOM, THE UNITED STATES
AND
OTHER COUNTRIES
1925-44
4000
3,000
2,000
1,000
0
TOTAL CANADIAN TRADE
UNITED STATES
UNITED KINGDOM
OTHER COUNTRIES
1925
1930
1935
1940
'44

GROWTH OVER THREE DECADES OF THE SIX LEADING EXPORTS IN 1943



GROWTH OVER THREE DECADES OF THE SIX LEADING IMPORTS IN 1943




WESTERN PORTS
VANCOUVER
VICTORIA
PRINCE RUPERT
CANADA'S TOTAL
$(000,000)
1,076
IMP 751
EXP 925
EASTERN PORTS
MONTREAL QUEBEC
HALIFAX SAINT JOHN
SYDNEY
EXTERNAL MERCHANDISE TRADE OF CANADA
AND
TRADE WITH CERTAIN COUNTRIES, 1939
(LATEST PRE-WAR CALENDAR YEAR)
CANADIAN TRADE WITH COUNTRIES CONCERNED
(FIGURES IN MILLIONS OF DOLLARS)
TOTAL
CANADIAN GOVERNMENT TRADE OFFICES
BRITISH POSSESSIONS, PROTECTORATES AND MANDATES
HISTORICAL LEVELS OF CANADA'S EXTERNAL TRADE
IMPORTS INTO CANADA, 1926-39
$000,000
1,500
1,000
500
0
All Countries
Empire Countries
Foreign Countries
1926
1930
1935
1939
DOMESTIC EXPORTS FROM CANADA, 1926-39
$000,000
1,500
1,000
500
0
All Countries
Foreign Countries
Empire Countries
1926
1930
1935
1939
BALANCE OF TOTAL MERCHANDISE TRADE (EXCLUDING GOLD) FOR CANADA, 1900-1939
$000,000
+300
+200
+100
0
-100
-200
-300
EXP EXCESS
IMP EXCESS
9 months
1890
1909
1910
1920
1930
1939
FISCAL YEARS
CALENDAR YEARS

DISTANCES BETWEEN PRINCIPAL POINTS IN CANADA*

NOTE: Generally, the distances given are the shortest by railway.

A knowledge of distances in miles between principal points constitutes very useful information in these days of wide travel, but when an attempt is made to compile such data difficulties are at once encountered. Railway distances are the logical choice, even though road distances are of increasing interest to a vast body of travellers by automobile and are a useful alternative. Railway distances represent usually the shortest practicable land distances between two points and even to-day the bulk of freight and passenger traffic is by rail. Again, distances by air (sometimes called "bee-line" distances) are only useful in practice to those who travel by air. This is a growing phase of transportation, of course, but has not yet assumed such proportions that its tabulation should displace the more usual one. Again, it is not a difficult matter to estimate air-line distances from a map made to convenient scale, whereas the ordinary reader is not able to obtain railway distances easily.

Even though it be decided to adopt railway distances as most useful, it is necessary to decide whether the most travelled route between two places or the shortest railway route should govern. In the tables given below, the distances between points are the shortest distances by railway and not necessarily the most travelled routes or the routes by which main trains travel. They are compiled principally from the railway time tables. The main table includes the capital of each province and some of the main shipping points chosen principally, but not altogether, by population; the subsidiary tables include distances of local importance. Included in the distances from Charlottetown is the distance from Borden to Cape Tormentine, over which the trains are transported by ferry; similarly, the train ferry distance between Mulgrave and Point Tupper is included in the distance from Halifax to Sydney. In the main table all the distances from Victoria include the distance travelled by boat from Victoria to Vancouver. However, wherever possible, railway distances only are used. In certain distances from Three Rivers and from Quebec it is possible, by the use of ferries, to travel by shorter routes than those given in the tables, the rail route only being taken in these cases.

Where boat routes are given, the best approximation of the distance travelled is used.

The air-line distances used are not necessarily the straight-line distances between points, but are the distances over the routes usually travelled by aeroplanes in good weather.

Place	Halifax	Moncton	Charlottetown	Saint John	Fredericton	Quebec	Montreal	Sherbrooke	Three Rivers	Ottawa	Kingston	Toronto	Hamilton	London	Windsor	Fort William	Winnipeg	Brandon	Churchill	Regina	Saskatoon	Calgary	Edmonton	Vancouver	Victoria	Prince Rupert
Halifax	0	189	239	278	292	662	747	646	740	858	920	1081	1120	1196	1306	1716	2012	2146	2991	2367	2483	2834	2813	3475	3560	3769
Moncton	189	0	126	89	104	473	558	457	551	669	731	892	931	1007	1117	527	1823	1957	2802	2178	2294	2645	2624	3286	3371	3580
Charlottetown	239	126	0	215	230	600	684	583	677	795	857	1018	1057	1133	1243	1653	1950	2084	2929	2305	2421	2772	2751	3413	3498	3707
Saint John	278	89	215	0	67	426	476	375	503	587	649	810	849	925	1035	1445	1776	1910	2755	2131	2247	2598	2577	3239	3324	3533
Fredericton	292	104	230	67	0	403	454	353	481	565	627	788	827	903	1013	1423	1753	1887	2732	2108	2224	2575	2554	3216	3301	3510
Quebec	662	473	600	426	403	0	169	127	78	280	342	503	542	618	728	1079	1350	1484	2329	1705	1821	2172	2151	2813	2898	3107
Montreal	747	558	684	476	454	169	0	101	95	111	173	334	373	449	559	969	1353	1486	2331	1707	1823	2174	2153	2815	2900	3109
Sherbrooke	646	457	583	375	353	127	101	0	196	212	274	435	474	550	660	1070	1454	1587	2432	1808	1924	2275	2254	2916	3001	3210
Three Rivers	740	551	677	503	481	78	95	196	0	206	268	429	468	544	654	1064	1448	1581	2426	1802	1918	2269	2248	2910	2995	3205
Ottawa	858	669	795	587	565	280	111	212	206	0	112	247	286	362	472	858	1242	1375	2220	1596	1712	2063	2042	2704	2789	2998
Kingston	920	731	857	649	627	342	173	274	268	112	0	161	200	276	386	908	1292	1426	2270	1647	1763	2113	2093	2754	2839	3049
Toronto	1081	892	1018	810	788	503	334	435	429	247	161	0	39	115	225	811	1207	1340	2185	1562	1677	2028	2008	2670	2755	2964
Hamilton	1120	931	1057	849	827	542	373	474	468	286	200	39	0	80	190	850	1246	1379	2224	1601	1716	2067	2047	2709	2794	3003
London	1196	1007	1133	925	903	618	449	550	544	362	276	115	80	0	110	926	1322	1455	2300	1677	1792	2143	2123	2785	2870	3079
Windsor	1306	1117	1243	1035	1013	728	559	660	654	472	386	225	190	110	0	1036	1432	1565	2410	1787	1902	2253	2233	2895	2980	3189
Fort William	1716	1527	1653	1445	1423	1079	969	1070	1064	858	908	811	850	926	1036	0	419	552	1397	774	889	1240	1220	1882	1967	2176
Winnipeg	2012	1823	1950	1776	1753	1350	1353	1454	1448	1242	1292	1207	1246	1322	1432	419	0	133	978	355	470	821	801	1463	1548	1757
Brandon	2146	1957	2084	1910	1887	1484	1486	1587	1581	1375	1426	1340	1379	1455	1565	552	133	0	937	221	384	688	715	1330	1415	1671
Churchill	2991	2802	2929	2755	2732	2329	2331	2432	2426	2220	2270	2185	2224	2300	2410	1397	978	937	0	845	813	1217	1144	1859	1944	2100
Regina	2367	2178	2305	2131	2108	1705	1707	1808	1802	1596	1647	1562	1601	1677	1787	774	355	221	845	0	163	467	493	1108	1193	1449
Saskatoon	2483	2294	2421	2247	2224	1821	1823	1924	1918	1712	1763	1677	1716	1792	1902	889	470	384	813	163	0	404	330	1046	1131	1287
Calgary	2834	2645	2772	2598	2575	2172	2174	2275	2269	2063	2113	2028	2067	2143	2253	1240	821	688	1217	467	404	0	194	642	727	1150
Edmonton	2813	2624	2751	2577	2554	2151	2153	2254	2248	2042	2093	2008	2047	2123	2233	1220	801	715	1144	493	330	194	0	761	846	956
Vancouver	3475	3286	3413	3239	3216	2813	2815	2916	2910	2704	2754	2670	2709	2785	2895	1882	1463	1330	1859	1108	1046	642	761	0	85	1158
Victoria	3560	3371	3498	3324	3301	2898	2900	3001	2995	2789	2839	2755	2794	2870	2980	1967	1548	1415	1944	1193	1131	727	846	85	0	1243
Prince Rupert	3769	3580	3707	3533	3510	3107	3109	3210	3205	2998	3049	2964	3003	3079	3189	2176	1757	1671	2100	1449	1287	1150	956	1158	1243	0

From Halifax—
- to Yarmouth ... 217
- Sydney ... 289
- Glace Bay ... 304
- New Glasgow ... 107

From Saint John—
- to Edmundston ... 236
- Campbellton ... 276
- St. Stephen ... 83

From Montreal—
- to Shawinigan Falls ... 89
- St. Hyacinthe ... 35
- Noranda ... 542

From Toronto—
- to Brantford ... 64
- St. Catharines ... 71
- Kitchener ... 62
- Oshawa ... 33
- Peterborough ... 77
- North Bay ... 228
- Sudbury ... 260
- Sault Ste. Marie ... 439
- Sioux Lookout ... 955
- Cochrane ... 479
- Kenora ... 1,105
- Cobalt ... 330
- Timmins ... 485
- Moosonee ... 666

From Winnipeg—
- to Portage la Prairie ... 54
- The Pas ... 468
- Flinflon ... 560
- Ilford (winter road from Ilford to Gods Lake 132 miles) ... 754
- Norway House (by boat from Selkirk) ... 313

From Regina—
- to Moose Jaw ... 42
- Swift Current ... 152
- Prince Albert ... 219
- North Battleford ... 259
- Yorkton ... 123

From Calgary—
- to Medicine Hat ... 176
- Lethbridge ... 127
- Banff ... 82
- Red Deer ... 95

From Edmonton—
- to Jasper ... 236
- Peace River ... 317
- Grande Prairie ... 407
- Waterways ... 305

From Waterways—
- to Fort Smith (air-line) ... 242
- Rae (air-line) ... 380
- Cameron Bay (air-line) ... 614
- Resolution (by boat) ... 512
- Norman (by boat) ... 1,123
- Aklavik (by boat) ... 1,606

From Vancouver—
- to Trail ... 507
- Kamloops ... 251
- Prince George ... 691
- Prince Rupert (by boat) ... 546
- Whitehorse, Y.T. (part by boat) ... 1,082
- Dawson, Y.T. (part by boat) ... 1,473

From Victoria—
- to Nanaimo ... 73

*Prepared under the direction of F. H. Peters, Surveyor General and Chief, Hydrographic Service, Department of Mines and Resources, Ottawa.

RAIL DISTANCES BETWEEN PRINCIPAL POINTS IN ONTARIO

(Mileages given are for shortest practical, not most travelled, routes.)

	Belleville	Brantford	Chatham	Cochrane	Cornwall	Fort Francis	Ft. William Pt. Arthur	Galt	Hamilton	Kenora	Kingston	Kirkland Lake	Kitchener-Waterloo	London	Niagara Falls	North Bay	Oshawa	Ottawa	Owen Sound	Pembroke	Peterborough	St. Catharines	St. Thomas	Sarnia	Sault Ste. Marie	Stratford	Sudbury	Timmins	Toronto	Windsor
Belleville	0	178	297	517	153	1090	861	170	152	1157	48	434	177	228	195	263	80	134	242	152	64	184	237	283	491	202	312	522	113	339
Brantford	178	0	119	536	331	1103	874	19	25	1170	226	453	30	55	68	282	98	312	151	330	142	57	59	114	504	39	325	541	65	165
Chatham	297	119	0	634	445	1217	988	121	145	1284	340	551	124	64	175	380	212	426	172	444	256	172	62	53	618	97	439	639	179	46
Cochrane	517	536	634	0	537	729	500	539	510	796	532	93	505	570	553	254	515	481	611	391	454	542	594	618	425	537	333	61	482	680
Cornwall	153	331	445	537	0	1140	911	323	305	1227	105	454	330	381	348	283	233	56	395	146	217	337	390	436	562	355	383	542	266	492
Fort Francis	1090	1103	1217	729	1140	0	229	1095	1077	334	1135	823	1102	1153	1120	857	1071	1105	1167	997	1026	1109	1162	1208	722	1127	778	790	1038	1264
Ft. William-Pt. Arthur	861	874	988	500	911	229	0	866	848	296	906	594	873	924	891	628	242	876	938	768	797	880	933	979	493	898	549	561	809	1035
Galt	170	19	121	539	323	1095	866	0	31	1162	218	456	11	57	74	285	90	304	131	322	134	63	73	116	496	37	317	544	57	169
Hamilton	152	25	145	510	305	1077	848	31	0	1144	200	427	42	81	43	256	72	286	166	304	116	32	84	140	478	65	299	515	39	191
Kenora	1157	1170	1234	796	1227	334	296	1162	1144	0	1202	890	1169	1220	1187	924	1138	1171	1234	1064	1093	1176	1229	1275	789	1194	845	857	1105	1331
Kingston	48	226	340	532	105	1135	906	218	200	1202	0	449	225	276	243	278	128	124	290	141	112	232	285	331	536	250	357	537	161	387
Kirkland Lake	434	453	551	93	454	823	594	456	427	890	449	0	422	487	470	171	432	398	528	308	371	459	511	535	429	454	250	99	399	597
Kitchener-Waterloo	177	30	124	505	330	1102	873	11	42	1169	225	422	0	60	85	251	97	311	130	329	141	74	76	108	503	27	324	510	64	170
London	228	55	64	570	381	1153	924	57	81	1220	276	487	60	0	124	316	148	362	108	380	192	112	16	59	554	33	375	575	115	110
Niagara Falls	195	68	175	553	348	1120	891	74	43	1187	243	470	85	124	0	299	115	329	209	347	159	11	113	183	521	107	342	558	82	222
North Bay	263	282	380	254	283	857	628	285	256	924	278	171	251	316	299	0	261	227	357	137	200	288	340	364	258	283	79	259	228	426
Oshawa	80	98	212	515	233	1071	842	90	72	1138	128	432	97	148	115	261	0	213	162	232	61	104	157	203	472	122	293	520	33	259
Ottawa	134	312	426	481	56	1105	876	304	286	1171	124	398	311	362	329	227	213	0	376	90	182	318	371	430	506	336	327	486	247	473
Owen Sound	242	151	172	611	395	1167	938	131	166	1234	290	528	130	108	209	357	162	376	0	394	206	198	124	157	568	76	389	616	129	218
Pembroke	152	330	444	391	146	997	768	322	304	1064	141	308	329	380	347	137	232	90	394	0	188	336	389	435	398	354	219	396	265	491
Peterborough	64	142	256	454	217	1026	797	134	116	1093	112	371	141	192	159	200	61	182	206	188	0	148	201	247	427	166	248	459	77	303
St. Catharines	184	57	172	542	337	1109	880	63	32	1176	232	459	74	112	11	288	104	318	198	336	148	0	116	172	510	97	331	547	71	219
St. Thomas	237	59	62	594	390	1162	933	73	84	1229	285	511	76	16	113	340	157	371	124	389	201	116	0	75	563	49	384	599	124	107
Sarnia	283	114	53	618	436	1208	979	116	140	1275	331	535	108	59	183	364	203	430	157	435	247	172	75	0	609	81	430	623	170	99
Sault Ste. Marie	491	504	618	425	562	722	493	496	478	789	536	429	503	554	521	258	472	506	568	398	427	510	563	609	0	528	179	486	439	665
Stratford	202	39	97	537	355	1127	898	37	65	1194	250	454	27	33	107	283	122	336	76	354	166	97	49	81	528	0	349	542	89	143
Sudbury	312	325	439	333	383	778	549	317	299	845	357	250	324	375	342	79	293	327	389	219	248	331	384	430	179	349	0	338	260	486
Timmins	522	541	639	61	542	790	561	544	515	857	537	99	510	575	558	259	520	486	616	396	459	547	599	623	486	542	338	0	487	685
Toronto	113	65	179	482	266	1038	809	57	39	1105	161	399	64	115	82	228	33	247	129	265	77	71	124	170	439	89	260	487	0	226
Windsor	339	165	46	680	492	1264	1035	169	191	1331	387	597	170	110	222	426	259	473	218	491	303	219	107	99	665	143	486	685	226	0

Section II

ONTARIO

Industrial Development

and

The Ontario Market

Data and Statistics Supplied

by

Ontario Bureau of Statistics and Research

DEPARTMENT OF THE PROVINCIAL TREASURER

Published by

TRADE AND INDUSTRY BRANCH

DEPARTMENT OF PLANNING AND DEVELOPMENT

QUEEN'S PARK - TORONTO

ONTARIO


PROVINCE OF ONTARIO
DEPARTMENT OF PLANNING AND DEVELOPMENT
HON. DANA PORTER, K.C., Minister.
MAP
OF THE PROVINCE OF
ONTARIO
DOMINION OF CANADA
SCALE
50 25 0 50 Miles 100 150 200
HUDSON BAY
JAMES BAY
MANITOBA
ONTARIO
QUEBEC
LAKE SUPERIOR
LAKE MICHIGAN
LAKE HURON
LAKE ERIE
LAKE ST CLAIR
UNITED STATES
ATLANTIC OCEAN
ST LAWRENCE RIVER
OTTAWA RIVER
Fort Severn
Fort Albany
Moosonee
The Pas
Brandon
Winnipeg
Red Lake
Sioux Lookout
Kenora
Dryden
Ignace
Armstrong
Geraldton
Longlac
Nakina
Hearst
Kapuskasing
Smooth Rock Falls
Cochrane
Iroquois Falls
Timmins
Kirkland Lake
Rainy River
Fort Frances
Atikokan
Nipigon
Schreiber
Port Arthur
Fort William
White River
Franz
Foleyet
Hawk Jct.
Chapleau
Gowganda
New Liskeard
Cobalt
Englehart
Timagami
Temagami
Capreol
Sturgeon Falls
North Bay
Sault Ste Marie
Massey
Sudbury
Mattawa
Pembroke
Renfrew
Hawkesbury
Montreal
Sherbrooke
Quebec
Cornwall
Smiths Falls
Brockville
Kingston
Belleville
Trenton
Port Hope
Peterborough
Lindsay
Bobcaygeon
Orillia
Midland
Barrie
Collingwood
Owen Sound
Wiarton
Meaford
Thornbury
Georgian Bay
Manitoulin
Little Current
Parry Sound
Huntsville
Gravenhurst
Bracebridge
Haliburton
Oshawa
TORONTO
ONTARIO
Guelph
Goderich
Kitchener
Stratford
LONDON
Woodstock
Brantford
MILTON
St Catharines
Niagara Falls
Buffalo
Rochester
Syracuse
Schenectady
Boston
Binghampton
New York
Portland
Sarnia
St Thomas
Chatham
WINDSOR
Detroit
Essex
Port Stanley
Port Dover
Simcoe
Tillsonburg
Ingersoll
Woodstock
Milwaukee
Chicago
Green Bay
Duluth
Mackinaw
Saginaw
Lake Nipigon
Lake Nipigon Forest Reserve
Lake of the Woods
Lake Abitibi
Height of Land
Albany River
Winisk River
Ekwan R
Attawapiskat River
Severn River
Winnipeg River
English River
Seine River
Rainy River
Pigeon R
Kenogami
Missinaibi R
Mattagami R
Groundhog R
Moose R
Abitibi R
Montreal R
Ottawa River
Mississippi R
Trent Canal
Kawartha Lakes
Muskoka Lakes
Lake Simcoe
Lake Scugog
Lake Ontario
Niagara River
Welland Canal
Detroit River
St Clair River
Thames River
Grand River
Long Point
Point Pelee
Pelee Island
Kettle Point
Sarnia Reserve
Walpole Island
Rondeau Park
Port Burwell
Port Rowan
Port Dover
Port Stanley
Port Colborne
Port Hope
Port Arthur
Fort William
Sault Ste Marie
Sandy L
Winisk L
Winnipeg L
Lake of the Woods
Lake Nipigon
Lake Abitibi
Lake Timiskaming
Lake Temagami
Lake Nipissing
Lake Simcoe
Lake Scugog
Lake Ontario
Lake Erie
Lake St Clair
Lake Michigan
Lake Superior
Lake Huron
Lake Nipigon Forest Reserve
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Lake Simcoe
Lake Scugog
Lake Ontario
Lake Erie
Lake St Clair
Lake Michigan
Lake Superior
Lake Huron

PROVINCE OF ONTARIO

GENERAL INFORMATION

Situation—Ontario is centrally located with respect to the whole of Canada; Quebec and the Maritime Provinces lying to the east, the Prairie Provinces and British Columbia to the west. It is bounded on the north by Hudson and James Bay and on the south by the St. Lawrence-Great Lakes Waterway and the states of New York, Pennsylvania, Ohio, Michigan, Wisconsin and Minnesota.

Ontario's strategic position is further enhanced by its wedge-like penetration into the industrial heart of the United States. About 82% of the Province lies south of the isotherm of 60° Fahrenheit, mean July temperature, the northern limit for the economic production of cereals.

Area—The Province extends about 1,000 miles from east to west and about 1,050 miles from north to south and has a total land area of 363,282 square miles. This area is somewhat in excess of the combined areas of the six states which form Ontario's southern boundary and three to four times the area of the United Kingdom. The Province is usually considered as being divided into two main geographical divisions—the heavily populated and highly industrialized "Southern Ontario," and the immense Northern section, world famous for its gold, copper, silver and nickel mines, and its pulp and paper mills, usually referred to as "Northern Ontario."

Population—The population of Ontario has been increasing at the rate of approximately 40,000 per year and is now slightly over 4 millions or one-third of the total population of Canada.

PERCENTAGE DISTRIBUTION OF POPULATION, AVERAGE 1934-43

*Includes Yukon and Northwest Territories.

Almost three-quarters of the inhabitants trace their racial origin to the British Isles; about 10% are of French origin and 16% of European origin other than French.

RACIAL ORIGIN OF THE POPULATION, ONTARIO, 1941

The population is heavily concentrated in Southern Ontario where about 60% of the people live in urban centres having a population of 1,000 or more. The people of Ontario are progressive and resourceful, this being partially attributable to the century-old educational system and much pioneer work in the establishment of modern schools and curricula for vocational and scientific training. Compulsory attendance and high educational standards have materially advanced the technical skill and productivity of a working force numbering 1,806,000. There are over 675,000 persons attending Ontario's schools and in excess of 1,000,000 residents have ten or more years of schooling.

Natural Resources—Much of Ontario's economic growth and present industrial strength may be attributed to abundant and strategically located natural resources.

The fertile, arable lands of Ontario are one of the Province's most valuable resources and are responsible for its leadership in value of agricultural production. Grain, livestock, dairy and poultry products, and fruit are produced in large quantities. In 1944 the gross value of Ontario's agricultural production was $620,300,000, largely accounted for by receipts from mixed farming.

The forests of Ontario cover an area of approximately 237,200 square miles of which 173,800 square miles are classified as "productive." The gross value of forestry products in Ontario in 1943, the last year for which complete information is available, was $196,000,000.

Most of the forest region of Ontario is publicly owned, the title being vested mainly in the Provincial Government. This is an important factor in the application of forest management. The Provincial Government has set aside large areas as provincial parks and forest reserves. It maintains four forest stations for demonstration reforestation plots and the production of forest tree-planting material. A fifth provincial station is maintained for the collection and extraction of forest seed. Forest research is carried on in the government's laboratory at Richmond Hill, where engineering and biological problems are investigated.

The northern part of the Province is also endowed with rich mineral deposits including gold, nickel, copper, and numerous other precious and base metals. Since 1907, Ontario has been Canada's leading producer of minerals, production having reached a peak of $269,815,000 in 1941. The 1944 output valued at $212,755,000 represented 43% of Canada's total mineral production.

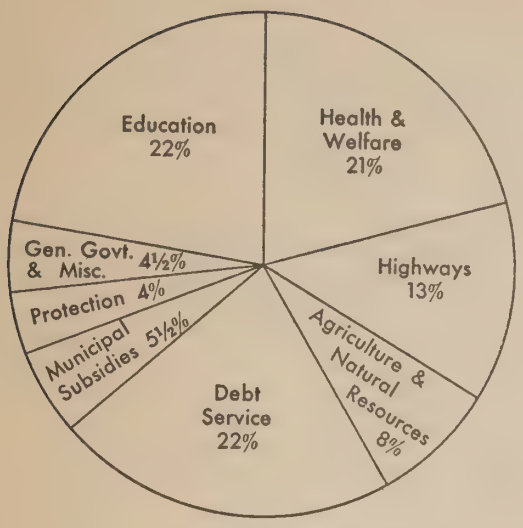
Ontario's deficiency in coal is greatly offset by vast water-power resources which make possible a supply of commercial and domestic power at rates which are among the lowest in the world. These water-power resources have been actively developed under the direction and control of the provincially owned and operated Hydro-Electric Power Commission of Ontario.

In the autumn of 1945, the maximum normal plant capacity of the Commission's own generating plants was 1,282,374 kilowatts. As a result of the very low rates in Ontario, the per capita consumption is very high. The total energy generated and purchased in 1945 was 12,490,000,000 kilowatt-hours. This abundant supply of hydro-electric power, coupled with huge forest reserves, made possible the development of the pulp and paper industry which, in Canada, heads the lists of industries in net value of production (excluding war industries).

Ontario's fish and game resources also add materially to the economic strength of the Province by attracting tourists and supporting a variety of industries associated with commercial fishing and the trapping of fur-bearing animals. The myriad lakes and rivers provide unexcelled facilities for hunting and recreational activities. To perpetuate these industries, steps have been taken by the Government to conserve and increase wild life by maintaining 120 Crown Game Reserves, which cover an area of over six million acres, fish hatcheries and rearing stations.

Financial Position—The Ontario Government's net ordinary revenue of $117,100,000 for the fiscal year ended March 31, 1945, was 3.6% of Ontario's proportion of the 1944 national income, that proportion being $3,266,000,000.

Net ordinary expenditure in the same fiscal year was $116,200,000, of which 43% was spent on education, health and welfare; 21% on highways and natural resources; 22% for debt service; 5½% for municipal subsidies; and 8½% for protection, general government and miscellaneous.



Functional distribution of the net ordinary expenditure of the Government of Ontario of $116,200,000, fiscal year ended March 31, 1945.

The net funded debt of the Provincial Government on March 31st, 1945, was $582,600,000, while the unfunded debt, consisting mainly of demand deposits with the Province of Ontario Savings Offices, totalled $54,200,000. These were offset by capital assets of $659,200,000, including a gross investment in roads and highways of $360,500,000, net advances to the Hydro-Electric Power Commission of Ontario of $95,500,000, and to the Ontario Northland Railway of $30,200,000. The net funded debt was 17.8% of the national income in Ontario.

The financial position of Ontario municipalities has been greatly improved since the early 1930's. This is indicated by the reduction in the total net debenture debt of all Ontario municipalities from $137.70 per capita in 1932 to $65.56 per capita in 1943. In the same period the per capita tax levy was reduced from $39.16 to $31.16.

Government—The legislative powers of the Government of Ontario are derived under the British North America Act, the written constitution of Canada. The Legislature of Ontario consists of 90 members, elected by popular vote. It is vested with plenary power to regulate the Province's affairs, dispose of revenues, and legislate on any matter within the jurisdiction of the Province. Among the subjects assigned to the Provincial Legislature are property and civil rights, education, public health, hospitals, development and conservation of natural resources, highways, local works, direct taxation and borrowing on the credit of the Province.

The business of the government is carried on by a number of government departments headed by cabinet ministers who are responsible to the legislature.

The present cabinet consists of the following ministers:

HON. GEORGE A. DREW, K.C.....Prime Minister and Minister of Education
HON. THOMAS L. KENNEDY.....Minister of Agriculture
HON. LESLIE M. FROST, K.C.....Treasurer and Minister of Mines
HON. LESLIE E. BLACKWELL, K.C.....Attorney-General
HON. GEORGE H. CHALLIES.....Minister without Portfolio, and Commissioner of the Hydro-Electric Power Commission
HON. GEORGE H. DOUCETT.....Minister of Highways and Public Works
HON. GEORGE H. DUNBAR.....Minister of Municipal Affairs and Minister of Reform Institutions
HON. WESLEY G. THOMPSON.....Minister of Lands and Forests
HON. CHARLES DALEY.....Minister of Labour
HON. DANA PORTER, K.C.....Minister of Planning and Development
HON. WILLIAM G. WEBSTER.....Minister without Portfolio
HON. RUSSELL T. KELLEY.....Minister of Health
HON. GEORGE A. WELSH.....Minister of Travel and Publicity
HON. WILLIAM A. GOODFELLOW.....Minister of Public Welfare
HON. D. ROLAND MICHENER, K.C.....Secretary and Registrar
HON. WILLIAM GRIESINGER.....Minister without Portfolio, and Chairman of the Liquor Control Board of Ontario

SURVEY OF PRODUCTION

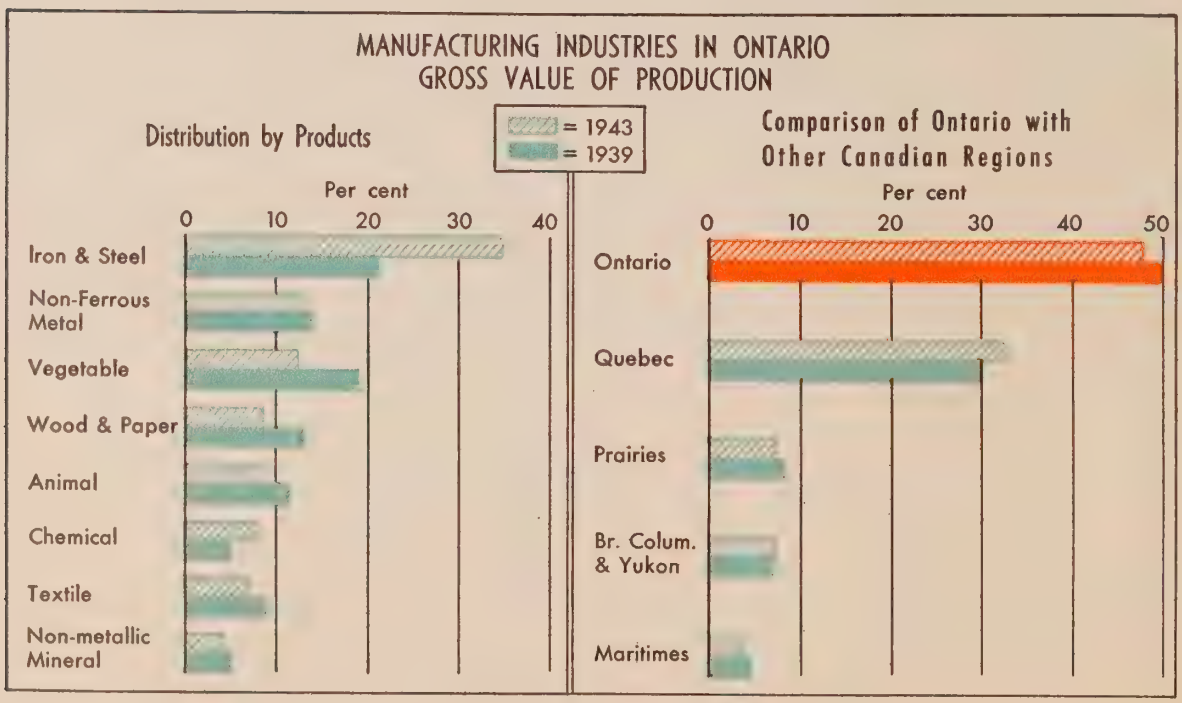
Ontario is the leading industrial province in Canada. With a third of the population, it accounts for 41.5% of the total net production of Canada, including 24% of the net value of forest products, 28% of agricultural production, 43% of the total mineral output, and 51% of the net value of manufactured goods.

Many factors have contributed to the attainment of this position—fertile farm lands, large stands of timber, abundant base and precious metal ores, water-power sites, waterways and strategic location. From the earliest days of the fur-trade, Ontario's position in the geographical centre of Canada, bordering the St. Lawrence-Great Lakes Waterway, provided a natural incentive for fur-trade and commerce and a centre for distributing and transporting services. Later, the Great Lakes Waterway furnished low-cost transportation for vessels bringing Pennsylvania coal and iron ore from Minnesota to feed the growing iron and steel industry in the manufacturing areas of Southern Ontario. Railways and highways were built to span the Province and today Ontario is efficiently served by a comprehensive transportation system using water, rail, highway, and air.

These factors have contributed to the development of an industrial economy similar in many ways to the great industrial centres of Buffalo, Rochester, Detroit, and Cleveland.

During World War I, Ontario's industries experienced a huge expansion in output, and a great increase in diversification. World War II further accelerated these trends, and even when allowances are made for abnormal wartime prices, the increase in the gross value of production from $2.56 billion in 1939 to $5.2 billion in 1944 is impressive.

At the present time, manufacturing leads Ontario's industries in value of production.



Manufacturing—Ontario has maintained a pre-eminent position in Canada's expanding manufacturing economy for the past sixty-five years. In 1880, the manufacturing industries of Ontario produced 51% of the total gross value of manufactured products in Canada. In 1917 this proportion was 52%, and in 1943 slightly over 48%. Somewhat less than half the capital employed in Canadian manufacturing industries has been invested in Ontario.

The chief forward movement in Canadian manufactures has been the result of three great influences: First, the opening up of the West at the beginning of the present century. This greatly increased the demand for manufactured goods of all kinds and particularly construction materials. Secondly, the War of 1914-18 which left a permanent imprint upon the variety and efficiency of Canadian plants; and thirdly, World War II.

Today, the manufacturing industries of Canada stand on the threshold of a new era in their development. The situation created as a result of Canada's strategic position as a source of food supply and armaments has had far-reaching effects on the magnitude and diversification of Canadian manufacturing products, and Ontario manufacturers have risen to the demands made upon them with singular success.

The Province produces over 57% of Canada's total iron and steel products and almost its entire output of automobiles, agricultural implements and starch manufactures. The latest figures show that Ontario produced 87% of Canada's total output of tannery products, 77% of rubber goods, 69% of electrical apparatus and supplies, 61% of fruit and vegetable preparations, 57% of flour and feed mills production and large percentages of such other products as woollen yarn, carpets, mats, and rugs, brass and copper products, jewellery and silverware, printing, publishing and bookbinding.

Since 1939, the capacity of Ontario's primary iron and steel industry has more than doubled. The non-ferrous metal industry has grown to a position where it ranks with the chief industries of the Province. The drug and chemical industry has also expanded and is planning sales considerably in excess of former peacetime levels. The enlarged capacities of these three industries will go a long way towards meeting the requirements of domestic consumers. The machine tool industry has grown from a relatively small size in 1939 to one producing precision gauges and instruments in quantities available for export markets. Similarly, the aeronautical industry has emerged with greatly increased productive capacity. Of special interest has been the establishment of a synthetic rubber plant at Sarnia, Ontario, having an annual output of about 35,000 long tons of buna-S and 10,000 long tons of butyl rubber. Research has given industry many new products from pulpwood, plastics and chemicals, and Ontario technicians and scientists have developed new methods and improved processes to speed up production and reduce machine costs. There is also a greater volume of skilled labour for industry to draw upon than at any previous time.

In view of the above developments, Ontario manufacturers are justified in viewing the post-war future with considerable confidence. In face of the unprecedented demand for all kinds of goods and services accumulated during the last war, and the great buying power developed through six years of saving, manufacturers are setting new production goals, confident of an expanding market for their products.

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GROSS VALUES OF PRODUCTION IN ONTARIO BY INDUSTRIES

(Thousands of Dollars)

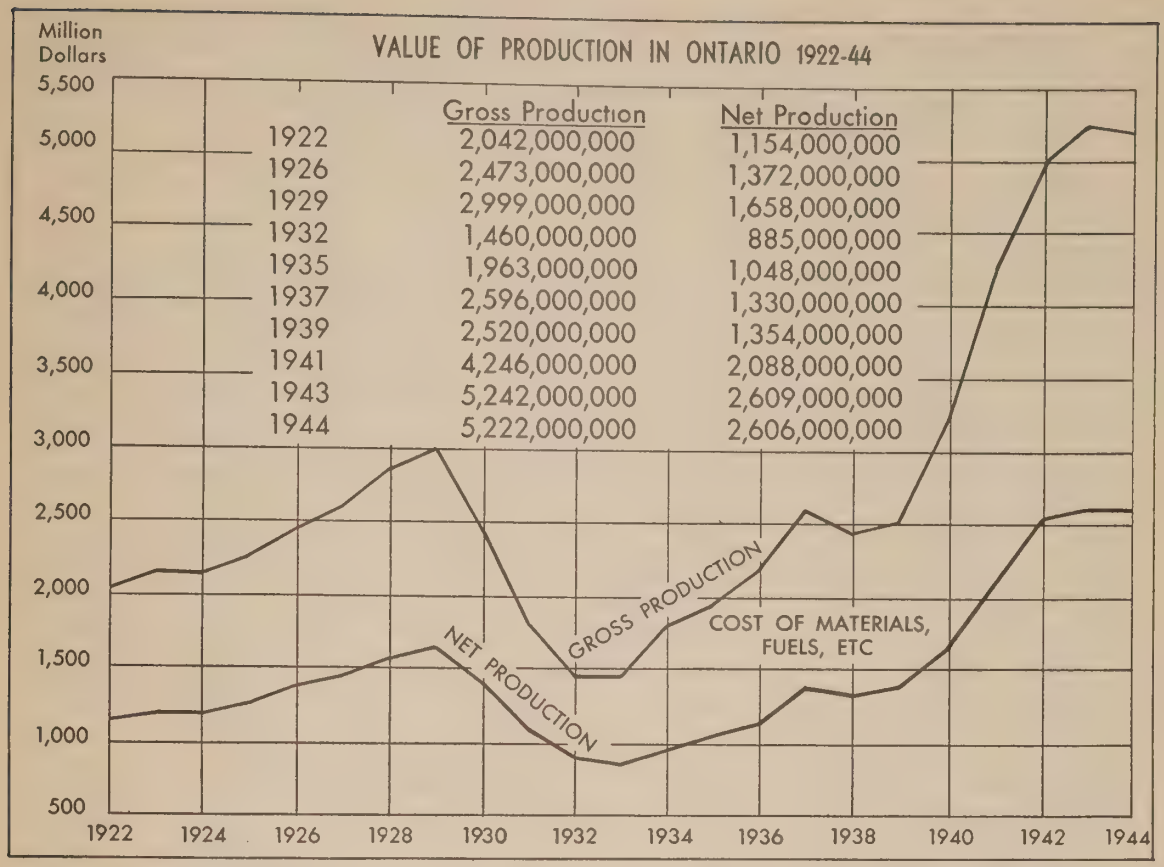
Industry	1935	1937	1939	1941	1943	1944 (1)
Manufactures	1,363,397	1,880,388	1,745,675	3,121,757	4,221,101	4,211,501
Agriculture	315,256	343,137	372,249	475,074	431,562	477,000
Mining	211,393	336,278	308,175	374,173	361,177	331,000
Forestry	89,946	128,262	117,598	169,109	196,131	226,597
Construction	90,849	148,352	144,829	261,239	216,715	154,086
Custom and Repair	68,556	57,375	64,373	81,761	83,519	88,641
Electric Power	43,667	52,752	52,136	65,340	69,047	67,949
Fisheries	2,852	3,616	3,010	3,518	5,292	5,934
Trapping	1,605	2,023	1,550	2,776	4,547	4,931
SUB TOTAL	2,187,521	2,952,183	2,809,595	4,554,747	5,589,091	5,567,639
Less Duplication in						
Forestry	....	....	....	....	12,670	11,878
Manufactures	224,577	356,537	289,764	309,096	334,399	333,634
TOTAL	1,962,944	2,595,646	2,519,831	4,245,651	5,242,022	5,222,127

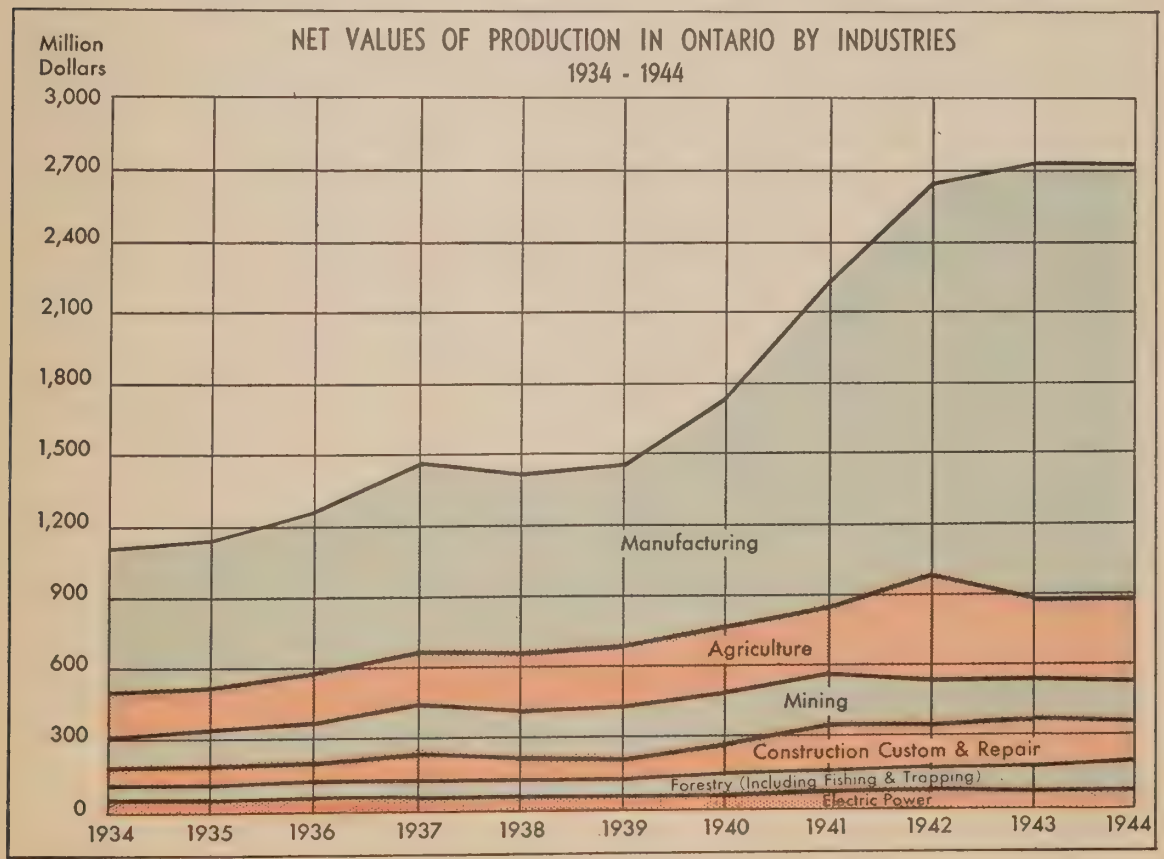
NET VALUES OF PRODUCTION IN ONTARIO BY INDUSTRIES

(Thousands of Dollars)

Industry	1935	1937	1939	1941	1943	1944 (1)
Manufactures	609,853	804,703	791,429	1,360,056	1,844,652	1,840,455
Agriculture	207,109	230,788	252,438	298,239	346,241	373,000
Mining	130,220	190,448	188,868	219,460	183,488	168,157
Forestry	51,391	72,381	67,721	99,209	110,581	127,758
Construction	50,649	71,502	68,536	108,171	112,054	79,671
Custom and Repair	41,231	38,833	38,110	55,482	56,670	60,145
Electric Power	43,646	52,702	52,100	65,316	69,028	67,931
Fisheries	2,852	3,616	3,010	3,518	5,292	5,934
Trapping	1,605	2,023	1,550	2,776	4,547	4,931
SUB TOTAL	1,138,556	1,466,996	1,463,762	2,212,227	2,732,553	2,727,982
Less Duplication in						
Forestry	....	....	....	....	12,670	11,878
Manufactures	90,427	137,042	109,211	124,268	110,377	110,124
TOTAL	1,048,129	1,329,954	1,354,551	2,087,959	2,609,506	2,605,980

(1) *Subject to Revision.*


Million Dollars
VALUE OF PRODUCTION IN ONTARIO 1922-44
5,500
5,000
4,500
4,000
3,500
3,000
2,500
2,000
1,500
1,000
500
1922 2,042,000,000 1,154,000,000
1926 2,473,000,000 1,372,000,000
1929 2,999,000,000 1,658,000,000
1932 1,460,000,000 885,000,000
1935 1,963,000,000 1,048,000,000
1937 2,596,000,000 1,330,000,000
1939 2,520,000,000 1,354,000,000
1941 4,246,000,000 2,088,000,000
1943 5,242,000,000 2,609,000,000
1944 5,222,000,000 2,606,000,000
Gross Production
Net Production
GROSS PRODUCTION
NET PRODUCTION
COST OF MATERIALS, FUELS, ETC
1922 1924 1926 1928 1930 1932 1934 1936 1938 1940 1942 1944


Million Dollars
NET VALUES OF PRODUCTION IN ONTARIO BY INDUSTRIES
1934 - 1944
3,000
2,700
2,400
2,100
1,800
1,500
1,200
900
600
300
0
Manufacturing
Agriculture
Mining
Construction Custom & Repair
Forestry (Including Fishing & Trapping)
Electric Power
1934 1935 1936 1937 1938 1939 1940 1941 1942 1943 1944

STATISTICS OF THE FORTY LEADING MANUFACTURING INDUSTRIES OF ONTARIO, RANKED ACCORDING TO GROSS VALUE OF PRODUCTION IN 1943

		Establishments	Capital	Employees	Salaries and Wages	Cost of Materials	Gross Value of Products
			$		$	$	$
1	Automobiles	4	139,042,369	24,160	57,374,388	248,469,070	351,765,839
2	Misc. chemical products	103	194,009,882	15,468	24,092,005	149,549,019	193,083,839
3	Non-ferrous metal smelting and refining	7	122,321,138	8,053	15,480,299	136,259,146	186,600,741
4	Iron and steel products	88	149,113,964	32,243	61,888,749	65,294,838	175,507,602
5	Automobile supplies	66	76,222,109	20,898	39,271,414	88,407,719	171,536,667
6	Electrical apparatus and supplies	160	106,573,606	31,254	50,616,473	65,504,908	169,654,250
7	Primary iron and steel	27	145,658,861	19,127	39,265,015	74,591,373	159,789,576
8	Slaughtering and meat packing	73	43,332,609	6,052	10,406,562	121,303,945	137,658,150
9	Brass and copper products	97	46,184,782	14,339	26,643,839	69,639,261	123,671,646
10	Flour and feed mills	721	36,329,020	3,890	5,377,482	99,556,725	116,144,871
11	Pulp and paper	40	188,668,105	11,002	22,260,167	47,008,529	108,256,330
12	Aircraft	22	122,195,091	27,015	51,851,346	26,861,594	106,218,069
13	Rubber goods	30	64,142,412	11,446	19,981,095	49,940,233	100,382,855
14	Machinery	170	74,195,355	17,491	32,447,269	26,899,489	94,340,123
15	Butter and cheese	861	31,010,821	8,199	10,943,960	62,971,936	83,750,034
16	Scientific and professional equipment	26	60,880,506	9,340	16,978,620	47,443,392	70,051,899
17	Petroleum products	16	38,021,549	2,773	5,913,719	49,050,861	69,227,431
18	Sheet metal products	108	46,577,935	10,350	16,634,566	31,620,821	62,418,799
19	Agricultural implements	24	60,376,726	13,634	24,092,278	24,559,428	55,478,204
20	Bread and bakery products	1,091	26,706,329	12,684	16,020,726	25,480,001	54,679,416
21	Hardware and tools	173	40,206,520	11,439	19,666,658	14,518,564	53,705,295
22	Clothing, men's factory made	118	20,433,388	10,741	14,822,803	28,161,803	48,660,442
23	Shipbuilding and repairs	21	36,325,397	9,578	18,594,067	14,487,826	48,636,195
24	Castings, iron castings and forgings	91	31,671,005	9,325	17,521,350	16,867,024	46,240,835
25	Hosiery and knitted goods	109	35,131,718	12,090	13,381,272	21,452,633	44,619,441
26	Fruit and vegetable preparations	182	40,929,323	6,687	7,321,381	26,303,054	44,457,791
27	Railway rolling stock	14	35,463,784	6,868	13,252,763	20,848,579	43,241,631
28	Biscuits,confectionery,cocoa,etc.	79	26,498,700	6,974	8,886,874	20,502,109	43,180,774
29	Leather tanneries	28	23,314,483	3,845	6,153,339	24,986,340	39,132,892
30	Printing and publishing	294	26,796,034	7,923	14,070,862	8,605,732	37,655,340
31	Coke and gas products	17	66,473,788	2,613	4,747,433	19,816,608	35,383,368
32	Acids, alkalies, and salts	21	57,201,970	4,286	8,177,086	11,231,978	34,509,997
33	Woollen cloth	37	19,709,253	5,262	7,109,117	19,806,500	33,722,858
34	Abrasive products	13	11,215,111	2,975	5,865,833	10,120,319	33,363,062
35	Clothing, women's factory made	265	11,409,827	6,873	9,576,695	17,497,254	33,185,455
36	Printing and bookbinding	566	26,298,069	8,113	11,697,672	12,643,456	32,101,895
37	Boxes and bags, paper	88	16,713,092	5,775	7,329,297	17,399,695	31,462,238
38	Bridge and structural steel	12	18,517,411	4,622	9,841,267	7,884,755	31,071,257
39	Aluminum products	13	18,025,162	4,891	7,527,350	13,441,619	29,862,491
40	Miscellaneous paper products	94	19,237,261	3,739	5,538,390	15,944,759	29,431,364
	Total, Forty Leading Manufacturing Industries	**5,969**	**2,353,134,465**	**434,037**	**758,621,481**	**1,862,932,895**	**3,363,840,962**
	Total, All Manufacturing Industries	**10,587**	**2,994,953,988**	**570,017**	**956,399,212**	**2,278,871,511**	**4,221,101,063**
	Percentage of Forty Leading Manufacturing Industries to Total of All Manufacturing Industries	56.3	78.6	76.1	79.2	81.7	79.7

Agriculture—Climate conducive to the growth of agricultural products together with the abundance of fertile farm lands, make for varied and profitable farming particularly in Southern Ontario. Mixed farming is carried on extensively while specialized production thrives in certain localized areas. Dairy cattle, beef cattle, hogs, wheat, oats, barley and hay and clover crops are to be found in almost every county. Cheese factories are located chiefly in Central and Eastern Ontario, while butter, fluid and condensed milk production together with evaporated and powdered milk production, are peculiar to the western counties. The Niagara Peninsula is noted for its fruit production, particularly peaches and grapes, while the southwestern counties yield tobacco, dry beans, sugar-beets and corn for husking. Fertile lands near urban centres produce large quantities of tomatoes, green peas, asparagus, apples, raspberries, pears, and numerous other products associated with market gardening. Soybean production in Canada is centred chiefly in Southern Ontario where 47,000 of the 50,400 acres in Canada devoted to this crop are located. The total yield in Ontario for 1944 was approximately 102,000 bushels. The largest share of the deliveries of this crop went to commercial interests engaged in the manufacture of soya flour and other soya products.

A substantial portion of Ontario's agricultural production is exported annually to augment the food supplies of the rest of the world. The following table gives a partial indication of the extent of this trade in 1945:

Hogs	1,900,000 head
Sheep and lambs	268,000 head
Butter	80,367,000 lbs.
Cheese	115,105,000 lbs.
Fluid milk	1,557,025,000 lbs.
Concentrated and condensed milk	337,135,000 lbs.

GROSS VALUE OF AGRICULTURAL PRODUCTION IN ONTARIO

(Thousands of Dollars)

	1935	1937	1939	1941	1943	1944(1)
Field crops	132,086	149,100	156,115	181,479	181,434	214,769
Farm animals	61,351	87,792	90,402	125,369	149,001	152,793
Wool	417	593	517	657	866	834
Milk production	50,168	55,491	57,094	77,109	110,859	117,413
Fruits and vegetables	17,292	18,507	21,365	31,909	54,674	39,282
Poultry products	22,345	23,199	24,391	34,345	61,343	59,159
Fur farming	966	1,351	1,173	1,231	2,038	2,115
Maple products	1,161	879	751	693	1,454	1,599
Tobacco	10,226	15,965	17,742	18,043	18,104	26,685
Fibre flax	161	133	358	1,125	737	723
Clover and grass seed	1,006	1,168	1,381	2,592	2,841	2,654
Honey and wax	1,115	753	960	1,332	3,116	2,307
	298,294	354,931	372,249	475,884	586,467	620,333

(1) *Subject to revision.*

The needs of the farm settlers in Northern Ontario have been given special attention during 1945. Marketing facilities have been improved, so as to make the markets in the mining areas and lumber camps readily available. A potato grading and storage warehouse has been put in operation at Cochrane with the assistance of the government. Co-operative facilities at New Liskeard have been extended and readily available veterinary services are in operation in several districts. Assistance is also being given to farmers in the improvement of the quality of their livestock and farm products generally. Loans have been made to co-operative associations to provide for the extension of creameries, cheese factories and storage facilities. Residential short term courses are being given to the farm boys in the Northern Clay Belt at the Experimental Farm at Kapuskasing.

Measures are also being put into effect which will greatly assist in the development of northern agriculture. One of the chief difficulties is that of securing adequate drainage and a rapid clearing of the land, so as to enable settlers to clear quickly a sufficient acreage on which to farm economically and support their families. Plans have been developed whereby a pool of large scale drainage and land clearing machinery will be placed at the disposal of farm settlers so that they will be provided with drainage outlets and will also be enabled at nominal cost to clear sections of their holdings in a short space of time and thus become self-supporting farmers more rapidly. These measures are being counted on to increase the farm population of Northern Ontario.

As a further aid in the marketing of farm products, plans have been completed for the construction and operation of the Ontario Food Terminal located in the Toronto area.

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Mines—The development of Northern Ontario's mining industry has been spectacular. While the Canadian Pacific Railway was being constructed in 1883, nickel ore was discovered near Sudbury, and today these deposits are the source of 90% of the world's nickel output. Ranking second to nickel in base metal production is copper, the production of which reached a peak value of $41,700,000 in 1937. Just as railway construction led to the discovery of the nickel-copper deposits at Sudbury, so the building of the provincially owned and operated Ontario Northland Railway (formerly Temiskaming & Northern Ontario Railway) in 1903 revealed valuable silver and cobalt deposits at Cobalt and Gowganda. The discovery of gold in the Porcupine area (1909) and at Kirkland Lake (1912) led to gold rushes of major significance. As a result of the production of these and other mines, the value of Ontario's gold output increased rapidly until 1941, when, owing to wartime restrictions and the scarcity of labour, a recession occurred. Since V-J Day prospecting has been greatly accelerated, and the numbers of claims staked and companies formed have achieved a record level. Ontario has never produced iron in large quantities, but in recent years active exploration of an extensive body of valuable haematite ore, with a high content of "natural" iron and an extremely low content of silica at Steep Rock Lake promises that the iron deficiency may be made good. This property is being equipped for an initial production of 2 million long tons per year. In addition to nickel, copper and gold mentioned above, important quantities of platinum metals and magnesium are produced. During 1945 the production of metallic calcium was started at Haley, Ontario.

In 1944, Ontario produced over 625,000 tons of salt or 87% of the total Canadian production. This yield represented the recovery of the mineral from brine wells and constituted a record production for the Province.

Of the other non-metallic minerals, the Province produces substantial quantities of gypsum, quartz, sulphur and mica.

Ontario ranks second among the provinces in the production of natural gas which is centred in the southwestern part of the Province. In this same area, in 1944, 132,800 barrels of petroleum were produced.

PROVINCE OF ONTARIO

TOTAL MINERAL PRODUCTION

Year	Platinum Metals	Copper	Nickel	Gold	Total Metallics Including Miscel.	Total Non-Metallics	Clay Products	Structural Materials	Total Mineral Production
	$	$	$	$	$	$	$	$	$
1930.....	2,436,683	15,186,467	24,455,134	35,923,260	83,393,067	8,492,263	5,221,214	16,571,626	113,678,170
1931.....	2,812,834	8,907,069	15,005,080	45,043,837	74,378,766	7,642,308	3,552,799	11,995,556	97,569,429
1932.....	1,998,911	5,025,684	7,179,862	53,418,449	70,130,845	7,361,897	1,690,505	7,295,917	86,479,164
1933.....	1,501,233	10,118,847	20,130,480	61,044,951	95,364,365	7,094,636	1,024,579	6,335,977	109,819,557
1934.....	6,187,992	14,822,704	32,139,425	72,808,688	129,273,033	7,553,571	1,261,006	7,766,563	145,854,173
1935.....	5,407,392	19,295,965	35,345,103	78,068,169	142,888,565	7,766,657	1,370,225	7,555,508	159,580,955
1936.....	7,802,997	26,898,920	43,876,525	83,308,179	165,231,519	8,933,036	1,573,936	8,931,899	184,670,390
1937.....	9,931,556	41,717,053	59,469,423	90,508,689	204,843,193	10,055,177	2,033,845	13,241,244	230,173,459
1938.....	8,873,621	30,405,500	53,914,494	101,945,441	197,905,460	9,949,317	2,083,496	10,012,203	219,950,476
1939.....	9,421,334	32,637,305	50,920,305	112,114,762	209,531,338	11,470,739	2,341,617	10,705,629	234,049,323
1940.....	7,760,157	34,742,229	59,822,590	125,579,597	234,227,235	12,514,093	2,513,884	13,950,607	263,205,819
1941.....	8,144,164	33,192,644	68,656,795	122,977,102	238,915,012	12,349,030	3,087,616	15,463,605	269,815,263
1942.....	19,176,254	30,625,404	69,998,427	106,413,978	232,640,178	12,406,382	2,549,487	13,767,041	261,363,088
1943.....	13,691,748	32,194,369	71,675,322	81,517,998	206,245,555	12,502,624	2,453,829	12,708,296	233,910,304
1944.....	8,024,719	33,845,632	69,204,152	66,675,000	185,940,774	11,075,707	2,347,396	13,391,477	212,755,354

Forestry—The forests of Ontario, which cover an area of 237,200 square miles, belong to the people of Ontario. Ninety-three percent of all accessible forests in Ontario are owned by the Province, and are among its greatest assets. Of the total forested area, 173,800 square miles or 73% is classified as "productive," and consists of merchantable timber for use as sawlogs, pulpwood or fuel. The "unproductive" forested area produces small trees growing under conditions unsuitable for the attainment of commercial size.

From Ontario's 110 million acres of accessible and productive forest lands in 1943 came a gross production value in pulpwood, wood-pulp and sawlogs of $196,131,000.

The forest resources of the Province provide the basis for a very great industry, that of wood and paper products which includes pulp and paper mills, saw and planing mills and factories manufacturing paper boxes and bags, furniture, sashes and doors, and such related industries as blue-printing, electrotyping, publishing and book-binding.

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GROSS VALUE OF FORESTRY PRODUCTION

(Thousands of Dollars)

Year	Operations in the Woods	Milling Operations Pulp and Paper Production	Sawmill Products	Gross Value of Forestry Production
1934	24,727	47,464	9,874	82,065
1936	31,571	59,167	13,069	103,807
1938	34,797	60,946	14,432	110,175
1940	43,275	87,966	20,934	152,175
1942	51,358	103,555	28,345	183,258
1943	61,143	108,256	26,732	196,131

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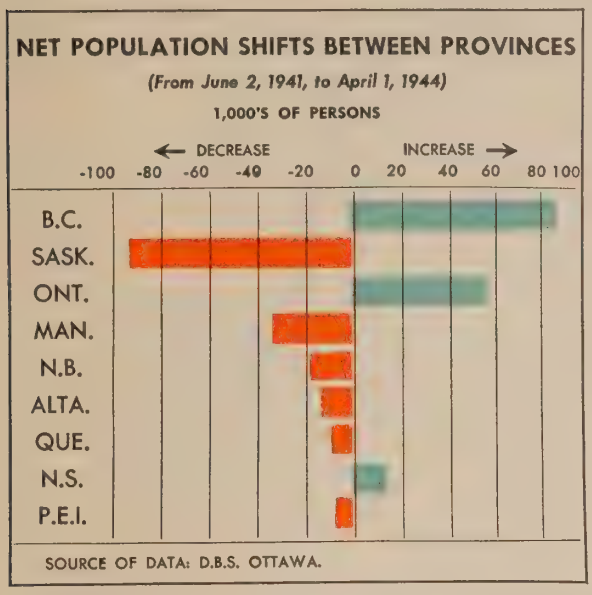
PRODUCTION OF WOOD-PULP IN CANADA, BY CHIEF PRODUCING PROVINCES, 1932-1943

	Quebec		Ontario		Canada*	
	Quantity	Value	Quantity	Value	Quantity	Value
Year	tons	$	tons	$	tons	$
1932	1,240,442	31,124,954	**786,405**	**18,735,105**	2,663,248	64,412,453
1933	1,360,704	29,860,706	**867,417**	**18,644,259**	2,979,562	64,114,074
1934	1,813,096	36,837,402	**999,935**	**21,000,769**	3,636,335	75,726,958
1935	1,916,382	38,235,076	**1,087,742**	**22,866,369**	3,868,341	79,722,039
1936	2,236,376	44,071,292	**1,257,060**	**27,005,484**	4,485,445	92,336,953
1937	2,551,546	55,277,014	**1,466,555**	**33,964,784**	5,141,504	116,729,228
1938	1,858,971	44,220,224	**1,057,984**	**25,821,023**	3,667,789	87,897,148
1939	2,119,183	49,026,966	**1,158,576**	**27,631,051**	4,166,301	97,131,817
1940	2,794,384	76,996,100	**1,369,389**	**38,235,733**	5,290,762	149,005,267
1941	2,971,386	89,103,399	**1,507,324**	**46,908,967**	5,720,847	175,439,551
1942	2,896,440	97,632,408	**1,518,967**	**51,936,704**	5,606,461	192,145,062
1943	2,617,403	93,969,226	**1,490,966**	**54,818,046**	5,272,830	194,434,202

**Includes production in British Columbia, Manitoba, New Brunswick and Nova Scotia.*

THE ONTARIO MARKET

An analysis of the buying habits of any section of the Canadian market must consider these factors: Population, Income of the People, Retail Sales, Wholesale Sales, and Purchases by Industry.



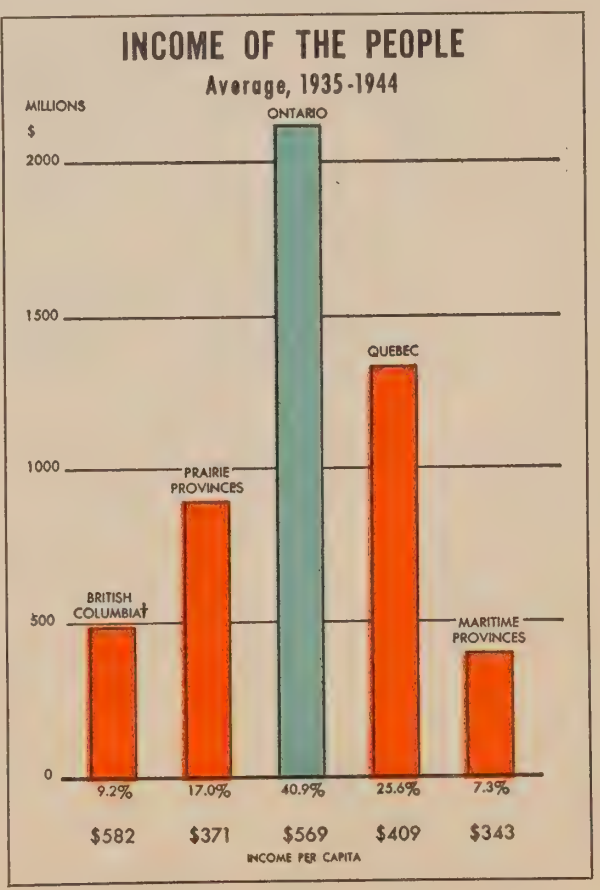
Ontario's present population of over 4 millions includes a considerable war-time increase. The estimated net civilian migration to Ontario during the years from 1941 to 1944 was approximately 58,000.

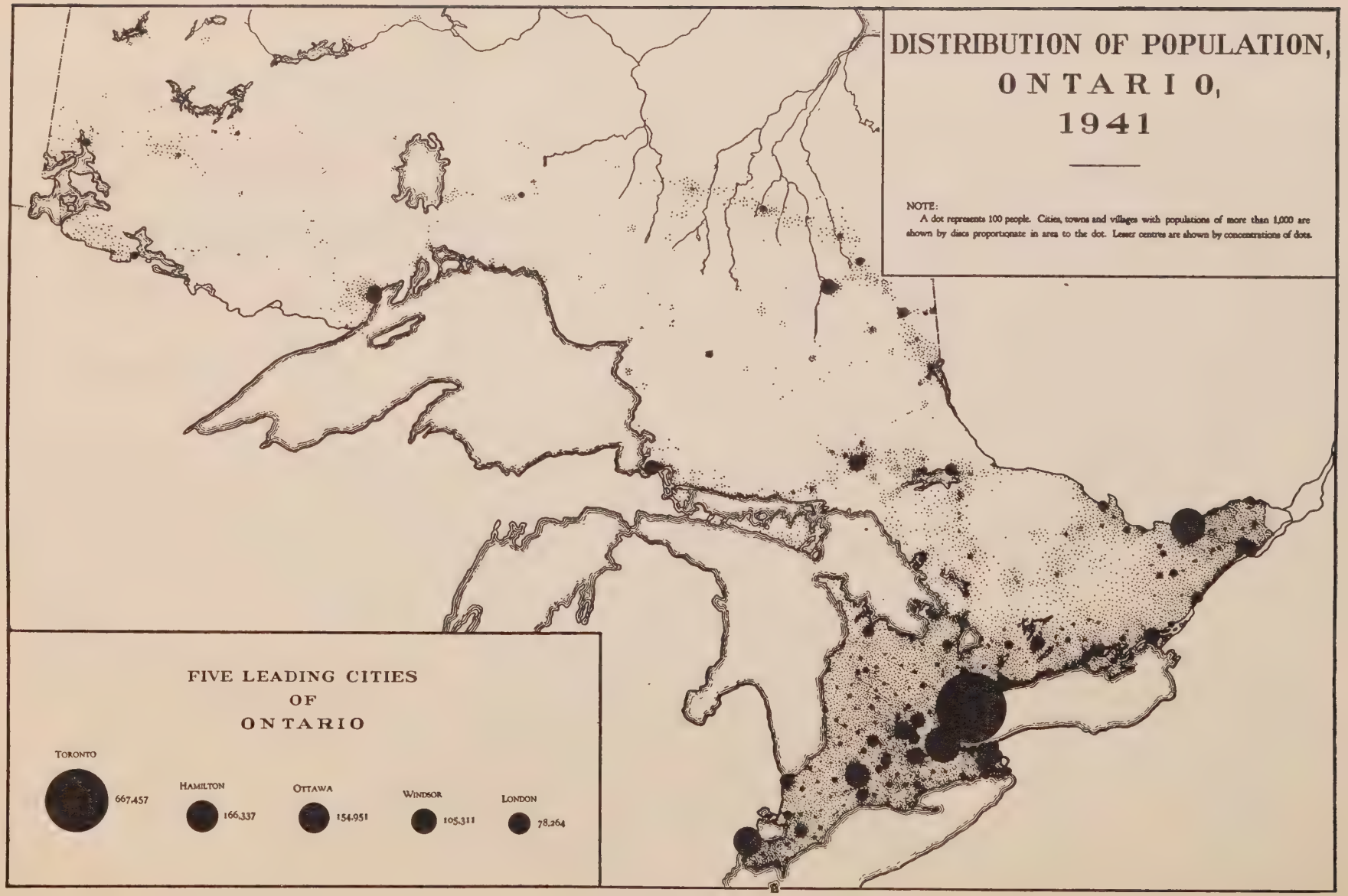
Within Ontario itself, there has been a great movement of the population from rural to urban areas, particularly the metropolitan centres. The war speeded up the existing trends towards increased urbanization and the drift toward the industrialized sections of the country owing to the greater job opportunities there as compared to those in the agricultural regions. There is much evidence to show that these workers who have migrated to Ontario during the war period are not likely to return to their former homes or will return only in small numbers over a period of time.

While our population is growing at a somewhat slower rate than in the past, the number of families is increasing faster than ever, emphasizing the fact that the size of the average family is decreasing. This increase in the number of families is of great importance to industries producing such commodities as refrigerators, kitchen ranges, automobiles, etc.

The Province of Ontario is the largest market in Canada from the standpoint of both population and buying power. At the last Census (1941) there were some 900,000 families in Ontario and of these 733,000 were living mainly in urban districts and the balance in farming areas. Ontario is the most highly urbanized of the Canadian provinces, having 43 municipalities with populations exceeding 10,000. In the Southern Ontario counties, the population density is 73 to the square mile. The rich mineral and forest districts in the northern part of the Province possess sizeable commercial and industrial centres with an economic life tied in very closely with the primary industries of the region. Greater Toronto, on Lake Ontario, provides the largest urban market in the Province, with its population of 930,000, of which about 675,000 live in the city proper and the remainder in suburban communities. Hamilton is next with a population of 175,000; then Ottawa having a population of 165,000; Windsor 115,000; London 80,000; and the twin cities of Fort William and Port Arthur with a combined population of 55,000.

A further indication of the extent and buying power of the Ontario market is the income of its people, an analysis of which appears in graphic form on this page. Retail sales indicate the volume of the local market, while wholesale transactions demonstrate the value of the Province as a distributing centre. Purchases by industry are indicative of the market for machinery and heavy equipment.




DISTRIBUTION OF POPULATION,
ONTARIO,
1941
NOTE:
A dot represents 100 people. Cities, towns and villages with populations of more than 1,000 are shown by discs proportionate in area to the dot. Lesser centres are shown by concentrations of dots.
FIVE LEADING CITIES
OF
ONTARIO
TORONTO
667,457
HAMILTON
166,337
OTTAWA
154,951
WINDSOR
105,311
LONDON
78,264

Retail Sales—The volume of retail sales in Ontario reflects the unique economic conditions of the market—the accessibility of consumers, the high level of incomes and the spending habits of the people.

The concentration of seven-eighths of the population in Southern Ontario (which comprises only one-eighth of the land area) and the network of low-cost rapid transport services bring product and purchaser effectively together. Seventy percent of Ontario farm homes have automobiles, by far the highest percentage of any province in Canada, and this, together with the fifty-seven thousand miles of surfaced roads, brings the farmer into close proximity with the retail market. The telephone and the newspaper also make the market more accessible to the city-dweller and the farmer. By 1941, one-half of the Ontario farms had telephones, the combined figure for both towns and country being considerably higher.

The high level of incomes in Ontario has already been noted. In terms of purchasing power, this is accentuated by the large proportion of cash incomes. In 1943, for example, salary and wage payments and benefits exceeded two billion dollars. Investment income is substantial, and a large part of the returns to farmers is from cash sales.

Ontario citizens have enjoyed a high standard of living over the years and have been provided with an advanced level of public services. With low-cost hydro-electric power reaching virtually all urban dwellers and 61 percent of rural consumers, electrically-operated stoves, washing machines, radios, vacuum cleaners and many other items find a ready sale and a repeat market. Again, Ontario residents make large market purchases of fresh vegetables and fruits, meats, dairy and bakery products. Moreover, this extensive marketing in relation to incomes has been fostered by modern methods of merchandising and sales promotion. Ontario merchants have established a world reputation for advanced marketing techniques, particularly through department and chain stores.

The tourist trade also forms an important element of retail sales. On the basis of information collected in 1945, tourists from the United States, entering Canada at Ontario border points, spent in that year a total of over $96 million.

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FACTS ABOUT THE ONTARIO MARKET

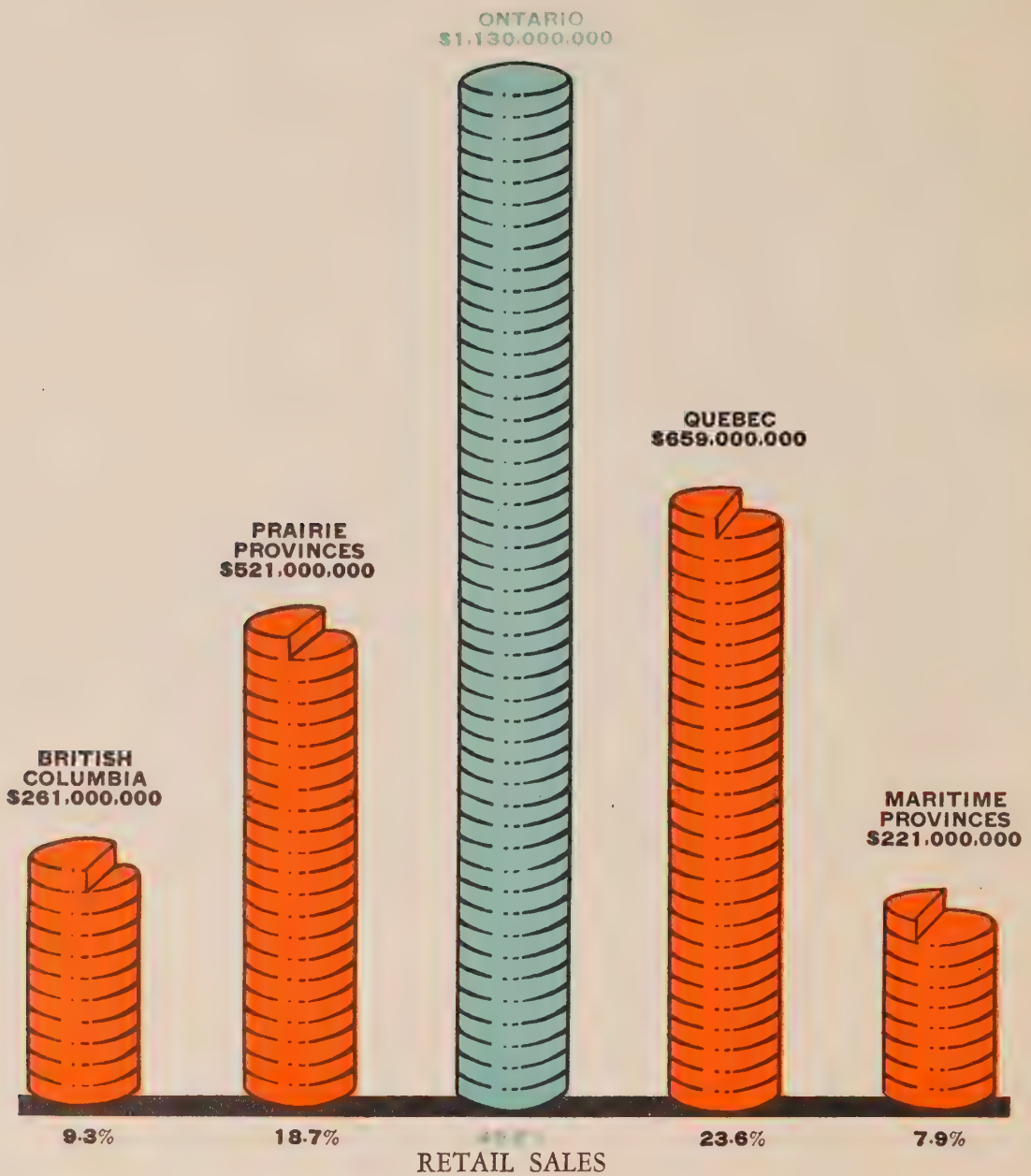
(1941 Census Data)

4,030,000 Population*	$5,242,022,000 Gross Production*
92% Canadian or British born	$3,266,453,000 Income of People*
98% English Speaking	$1,744,664,000 Wholesale Sales
743,000 People in Farming Areas	$1,380,690,000 Retail Commodity Sales
969,000 Households	$ 328,526,000 Foods
903,000 Families	$ 209,979,000 Clothing and Footwear
514,000 Owned Dwellings	$ 110,422,000 Retail Services
400,000 Rented Dwellings	$ 29,065,000 Amusement and Recreation
637,000 Passenger Automobiles	$ 36,001,000 Personal Services
57,000 Miles Surfaced Roads*	
1,806,000 Gainfully Occupied*	

**Data collected subsequent to 1941 Census.*

RETAIL SALES

10-Year Average (1934-1943)



RETAIL SALES

(Thousands of Dollars)

	British Columbia	Prairie Provinces	**Ontario**	Quebec	Maritime Provinces	Canada*
1934	178,286	373,216	**839,167**	457,133	147,396	1,997,286
1935	198,740	402,404	**880,949**	476,757	157,640	2,118,687
1936	224,575	438,104	**946,401**	522,242	170,393	2,303,684
1937	253,913	468,704	**1,073,587**	609,678	199,862	2,608,163
1938	239,470	479,649	**1,030,203**	602,723	189,201	2,543,660
1939	241,677	501,694	**1,044,110**	607,064	196,406	2,593,138
1940	272,273	556,608	**1,194,525**	688,071	235,924	2,949,579
1941	309,574	618,790	**1,406,977**	818,671	282,813	3,440,902
1942	337,690	655,549	**1,438,010**	891,916	304,507	3,632,952
1943	350,584	710,895	**1,443,622**	916,132	325,329	3,753,874

**Includes sales in Yukon and Northwest Territories.*

RETAIL SALES—ONTARIO

Estimated Commodity Sales in 1941
in Retail Merchandising Establishments

(Thousands of Dollars)

Food, Beverages, etc.			
Fresh fruits and vegetables	41,314		
Meats, fish and poultry	75,897		
Dairy products and eggs	48,931	328,526	
Fresh bakery products	10,864		435,760
Other food products	151,520		
Sales of meals and lunches (1)	51,499		
Alcoholic beverages (1)	55,735		
Clothing and Footwear			
Men's and boys' clothing	69,625	173,770	
Women's, misses' and children's clothing	104,145		
Men's and boys' shoes and boots	10,940		209,979
Women's, misses' and children's shoes and boots	18,016	36,209	
Rubbers, overshoes, slippers, etc.	7,253		
Fuel			59,718
Furniture, house furnishings, etc.	28,055		
House furnishings	18,707		111,716
Dry goods and notions	36,951		
Household supplies (china, glassware, soaps, etc.)	28,003		
Builders' Supplies, Hardware, etc.			
Building materials	33,964		
Wallpaper	1,970		60,374
Paints, varnishes and glass	7,931		
Hardware	16,509		
Household Appliances			
Electric refrigerators	6,959		
Electric vacuum cleaners	850		
Electric washing machines	3,231	20,727	
Electric ranges and stoves	2,470		25,692
Other electrical appliances and supplies	7,217		
Gas appliances and supplies	2,487		
Other stoves and ranges	2,478		
Radios and Radio Equipment			7,539
Motor Vehicles and Supplies			
New passenger automobiles	51,298		
Other motor vehicles and tractors	72,347		245,146
Parts and accessories	32,675		
Gasoline, oils and greases	88,826		
Jewellery, Silverware, Clocks and Watches			16,582
Sporting Goods, Toys, Games, etc.			9,636
Stationery, Books and Magazines			15,836
Drugs and Toiletries			
Drugs and drug sundries	24,519		35,082
Toilet articles and preparations	10,563		
Other Merchandise Sales (including second-hand goods)			147,630
TOTAL COMMODITY SALES			**1,380,690**
Receipts from Services in Merchandising Stores			26,287
			1,406,977

(1) Does not include sales in hotels.

Wholesale Sales—Ontario contains a large number of wholesale outlets which supply the requirements of business enterprise throughout the Province. Because of its strategic position and variety of industry, it also performs wholesaling functions for many merchandising centres in other parts of the Dominion. In 1941, the latest year for which figures are available, wholesale outlets in the city of Toronto sold goods to a value of more than $1 billion. Hamilton wholesalers stood second with a turnover of almost $100 million; Ottawa was third with sales of approximately $70 million. Windsor, which is located on the southwestern border, had sales of $47 million, and the city of London, which derives considerable trade from southwestern Ontario, had sales of $40 million. Simcoe, Kitchener, and Sarnia accounted for $20 million, $14 million and $10 million worth of wholesale sales respectively.

A large volume of wholesale business is required to take care of the mining and lumbering areas of the Province. The cities of Sudbury and Timmins are the largest distributors in the mining district. At the head of the Great Lakes, Fort William and Port Arthur had wholesale sales amounting to $25 million.

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SALES BY ALL TYPES OF WHOLESALE OPERATORS—CALENDAR YEAR 1941

(Thousands of Dollars)

	British Columbia*	Prairie Provinces	Ontario	Quebec	Maritime Provinces
Wholesalers Proper	191,570	362,295	**817,787**	849,061	137,763
Manufacturers' Sales	71,781	142,179	**478,550**	452,369	82,099
Agents and Brokers	77,628	310,427	**207,595**	291,885	
Other Wholesale Operators	38,331	371,371	**240,732**	133,206	34,122
	379,310	1,186,272	**1,744,664**	1,176,521	253,984

**Includes Yukon and Northwest Territories.*

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SALES BY WHOLESALERS PROPER

(Thousands of Dollars)

Calendar Year	British Columbia	Prairie Provinces	Ontario	Quebec	Maritime Provinces
1930	131,414	288,503	**471,618**	386,229	92,302
1931	107,612	210,683	**397,832**	323,269	78,968
1932	85,102	188,212	**334,559**	267,905	64,880
1933	83,418	174,888	**324,828**	254,696	62,666
1934	94,131	195,416	**374,288**	288,417	71,044
1935	102,171	211,741	**392,730**	299,999	74,101
1936	111,532	230,288	**431,477**	327,034	81,212
1937	127,720	250,228	**495,682**	386,953	91,629
1938	123,239	257,621	**468,781**	359,637	86,691
1939	131,748	274,187	**492,124**	381,767	95,724

Purchases by Industry—With the expansion and increased specialization of manufacturing in Ontario, purchases of materials and products from suppliers, both inside and outside the Province, have assumed increasing importance. Ontario's varied industry enables manufacturers to fill the majority of their requirements from materials and supplies originating within the Province, but Ontario manufacturers are also large buyers of raw materials such as natural rubber, cotton, and sugar cane, processed materials such as crude chemicals and special alloys, and component parts for automobiles and machinery—all largely imported.

As a result of conditions imposed by the wartime emergency, manufacturers in Ontario were compelled to find at home many of the products and materials which had formerly been imported. For the first time, some types of electrical and metal components were produced within the Province and the production of rayon fibre and the use of native wool has been expanded. Ontario is also less dependent on imports of natural rubber owing to the establishment of a synthetic rubber plant in southwestern Ontario and the processing of reclaim. Moreover, many Ontario producers are not only supplying home manufactures, but are succeeding in building up sales in export markets.

Precise data are not available on the value of purchases by industry according to origin, but the major expenditure shown on the chart on page 22 is for materials produced within the Province.

PURCHASES BY INDUSTRY

(Thousands of Dollars)

	Yukon and Northwest Territories	British Columbia	Prairie Provinces	**Ontario**	Quebec	Maritime Provinces	Canada
1934	.....	88,145*	119,152	**609,875**	357,367	54,975	1,229,514
1935	.....	105,662*	138,506	**717,863**	398,111	59,005	1,419,147
1936	.....	121,362*	157,369	**822,884**	455,028	67,571	1,624,214
1937	.....	144,466*	187,366	**1,025,872**	562,889	86,333	2,006,926
1938	.....	127,196*	178,231	**909,959**	518,431	73,661	1,807,478
1939	139	136,656	174,342	**907,011**	536,823	81,189	1,836,160
1940	97	170,358	217,777	**1,236,739**	713,133	111,618	2,449,722
1941	129	219,756	292,344	**1,683,912**	961,162	139,243	3,296,546
1942	139	270,823	361,074	**2,056,747**	1,193,445	154,874	4,037,102
1943	138	294,445	453,715	**2,288,872**	1,483,628	179,695	4,700,493

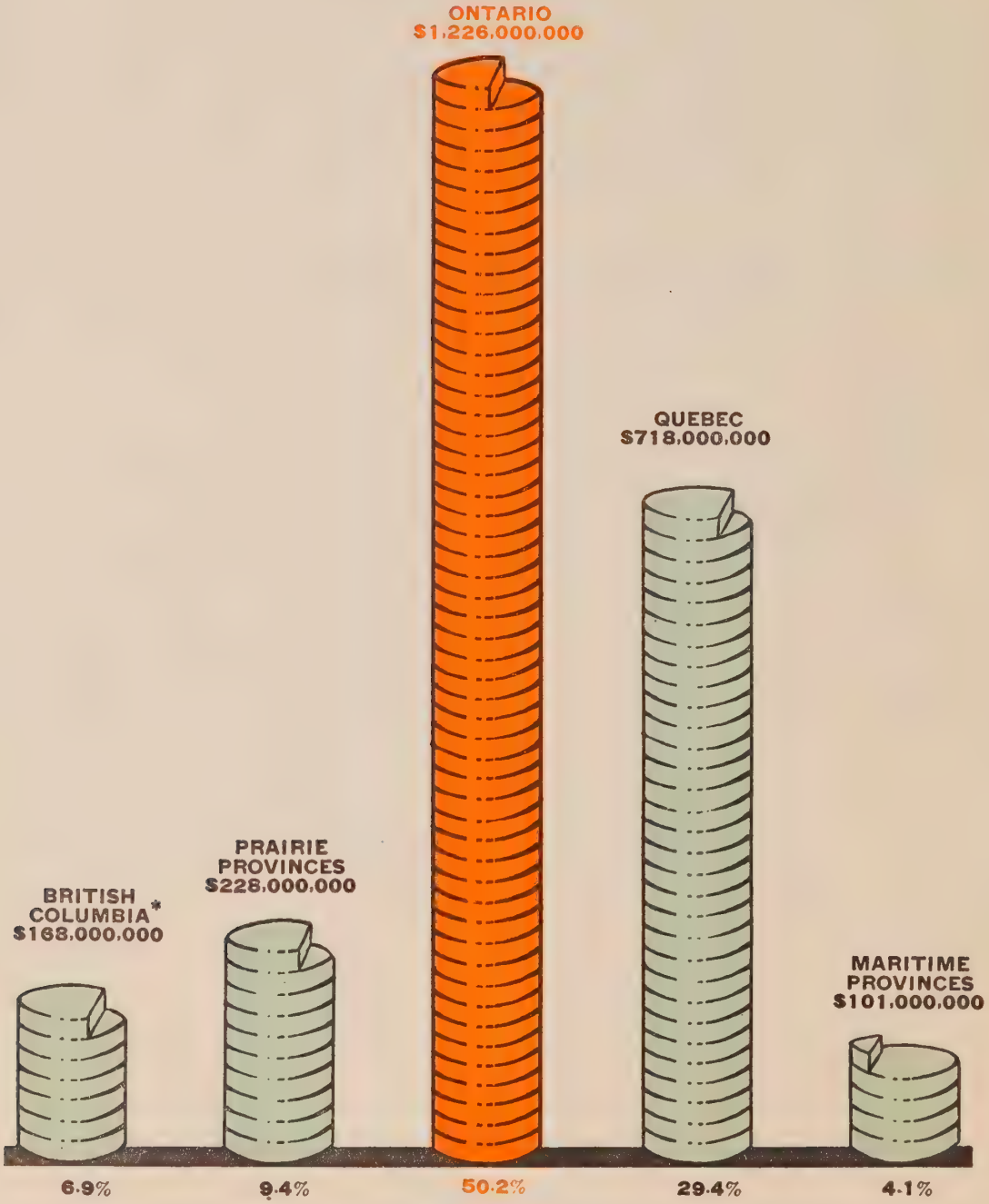
**Includes Yukon and Northwest Territories.*

SUMMARY OF MARKET STATISTICS

Market Zone	Population	Income of the People	Purchases by Industry	Retail Sales
B.C.	7.2	9.2	6.9	9.3
Prairies	21.4	17.0	9.4	18.7
Ontario	**33.0**	**40.9**	**50.2**	**40.5**
Quebec	28.6	25.6	29.4	23.6
Maritimes	9.8	7.3	4.1	7.9

PURCHASES BY INDUSTRY

Ten-Year Average, 1934-1943



*Includes Yukon and Northwest Territories.

TRANSPORTATION

To a province having the area, diversity of industry and trading activities of Ontario, transportation is of paramount importance. In this regard, Ontario is very fortunate. The larger population centres are served by an unexcelled inland waterway; railways and highways criss-cross the Province in a close pattern, and commercial air lines are making distinguished progress in a relatively new field. The following details of the chief modes of transportation in Ontario by rail, road, water and air, are necessarily fragmentary but may provide an indication of the comprehensive transportation systems operating in the Province.

Railways—Ontario is served by twelve railroads having a total single-track mileage in 1942 of over 10,000 miles or 25% of the total railway mileage in Canada. The Canadian Pacific and Canadian National Railways account for over 84% and the Ontario Northland Railway for 5% of the total mileage.

Highways—During the past twenty-five years, the construction of roads has been one of the principal activities of the Province of Ontario and its municipalities. Perhaps no single feature is more closely associated with the economic life of the people than are the roads of the Province. Products of the farm, factory, mine, lake and forest, derive enhanced value from their proximity to the market made possible by roads and highways. One of the newest industries of the Province, the tourist trade, depends to a large degree on this network of highways which had a total mileage in 1944 of approximately 57,000 miles.

Waterways—The Great Lakes, together with connecting rivers and canals, comprise the greatest inland water system in the world from the standpoint, both of continuous passage and volume of traffic. Coal, iron and wheat make up the bulk of the freight carried in Ontario's waterway system, and in 1940, traffic passing through the canal at Sault Ste. Marie amounted to approximately three times that passing through the Panama Canal. All the main population centres of Southern Ontario have ready access to water transportation, either directly through location on the waterway itself or indirectly through railways and highways connecting them with the principal lake ports. Ontario has twenty lake ports each of which handles in excess of one-half million tons of freight annually. A substantial portion of this cargo comes directly from overseas in vessels operated by European lines.

Volume of Traffic Passing Through Ontario's Canals

Canal	Traffic in Tons 1943
Welland Ship	9,328,095
Sault Ste. Marie	4,383,596
St. Lawrence	4,290,401
Trent	34,565
Murray	4,345
Rideau	1,551
Total	18,042,553

Commercial Airways—Ontario is served by a comprehensive network of airlines operating across Canada from coast to coast and from Southern Ontario into the northern part of the Province. The main line of Trans-Canada Airlines has principal air fields at such Ontario centres as Ottawa, Toronto, London, Windsor, North Bay, Kapuskasing and Armstrong. In 1943, airlines in Ontario carried 61,000 passengers, 4.5 million pounds of freight and over one million pounds of mail.

ONTARIO

THE DEPARTMENT OF PLANNING AND DEVELOPMENT

TRADE AND INDUSTRY BRANCH - QUEEN'S PARK, TORONTO

CO-OPERATES with other departments of the Government, municipal officials, and industrial and business organizations in the establishment of new industries or branch plants; in the development of industries already established; and in the utilization of the natural resources of the Province of Ontario.

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Collects and supplies statistics on trade and industry and authoritative information on the natural resources and industrial assets of Ontario municipalities.

•

Assists manufacturers and other organizations to find raw materials, to develop new products, and to expand their domestic and foreign trade.

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Acts as a complementary office to the Trade and Industrial Department at Ontario House, London, England, providing a channel for the reciprocal flow of information on trade and industry between Ontario and Great Britain.

•

Handles all inquiries in strict confidence and without charge or obligation.

Section III

HYDRO

Hydro-Electric Power Development

in the

Province of Ontario

Data and Statistics Contributed

by

THE HYDRO-ELECTRIC POWER COMMISSION OF ONTARIO

ONTARIO'S UNIQUE *Electrical* SERVICE

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ONTARIO offers an abundant supply of electrical power at low rates to primary and secondary industries locating in the Province.

The sources of Ontario's electric power are the waterfalls and rapids on its great river systems. Because of the Province's favourable climatic and hydrological features, including thousands of lakes, these resources, abundantly provided by nature, are dependable throughout the year.

Ontario's electric power supply is unique, in that most of it is provided through a Province-wide, publicly-owned, co-operative municipal enterprise, popularly known as "Hydro." This organization, now serving some 900 municipalities, has been supplying electrical energy for more than thirty years. Today, the generation and distribution of electricity throughout the Province is predominantly a Hydro undertaking.

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HYDRO'S FUTURE IS ASSURED . . . THE NUMEROUS WATERFALLS AND RAPIDS ON ONTARIO'S GREAT RIVER SYSTEMS AND LAKES ARE SOURCES OF ABUNDANT LOW-COST POWER

Hydro

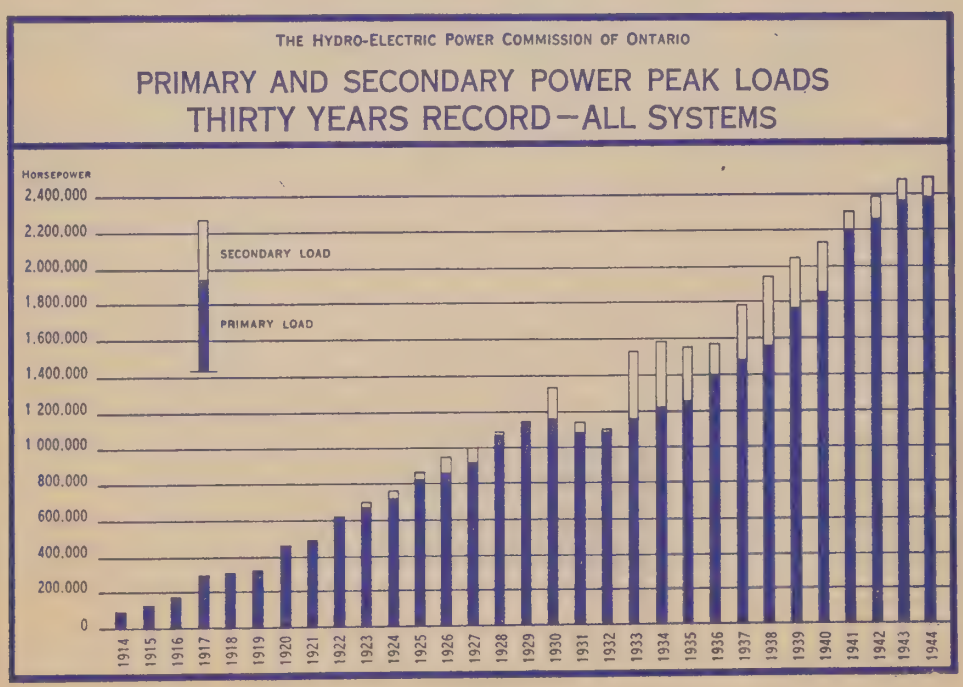
The Hydro-Electric Power Commission of Ontario is an independent, self-sustaining, co-operative organization appointed by the Provincial Government in 1906. It is endowed by the Power Commission Act with broad powers to develop, purchase and distribute electricity, and to perform certain regulatory functions with respect to the activities of the public utilities commissions of the co-operating municipalities who are partners in the undertaking.

Fundamentals that have been insisted upon from the very beginning are: that business principles must be strictly followed in all phases of operation and of finance; and that government participation in the undertaking be limited to that degree of supervision of general policies necessary for the protection of the guarantees of the Province in connection with the enterprise.

HYDRO service involves three distinct fields of operation:

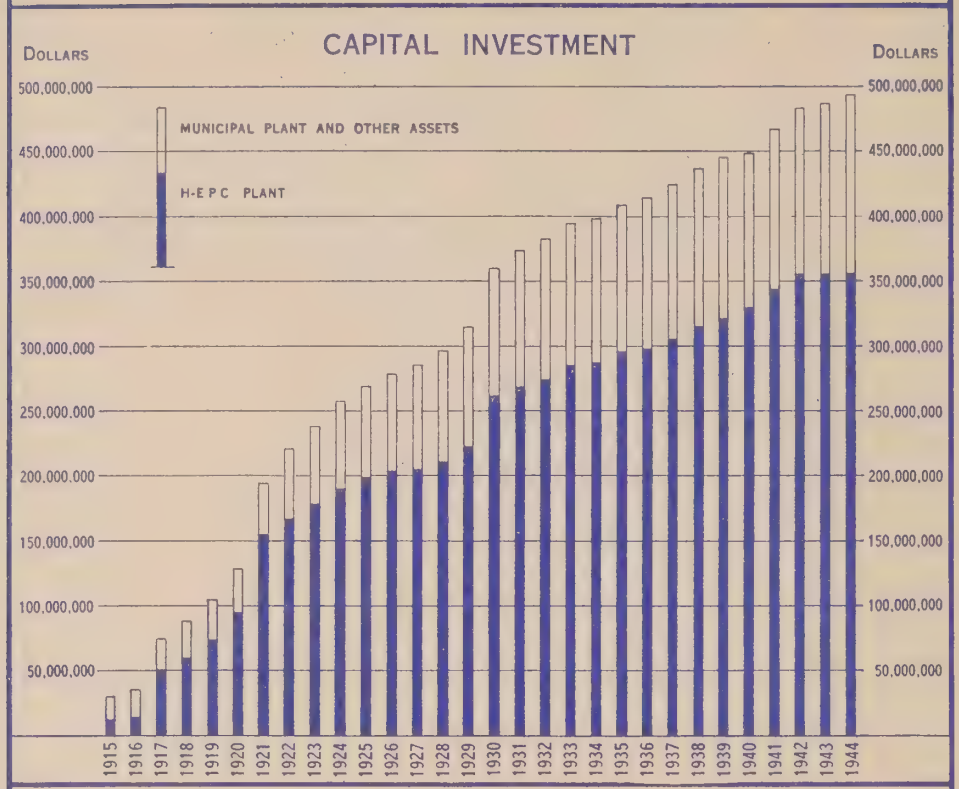
The FIRST is the co-operative municipal field and covers the provision of electric power and its supply in wholesale quantities to individual municipalities and to large industrial consumers. This is performed by The Hydro-Electric Power Commission of Ontario as trustee for the municipalities. In the cases of cities, towns, many villages, and certain thickly populated areas of townships, retail distribution of power, provided by the Commission in wholesale quantities, is, in general, conducted by individual local municipal utility commissions under the general supervision of The Hydro-Electric Power Commission of Ontario.

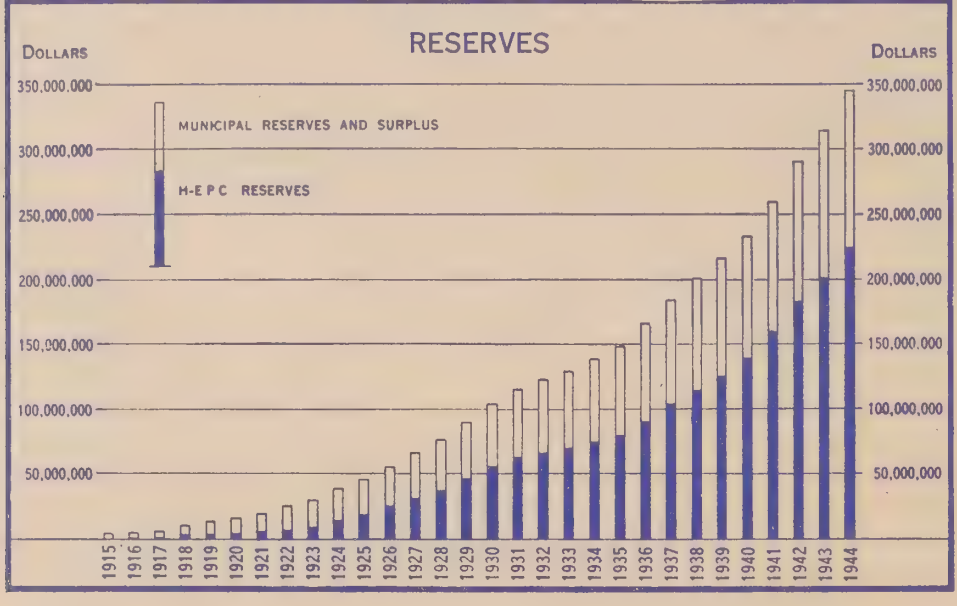
The SECOND field covers the distribution of electricity to consumers in rural districts. In such rural areas, the Commission not only provides the power at wholesale, but also attends to all physical and financial operations connected with the distribution of power at retail to the consumers.

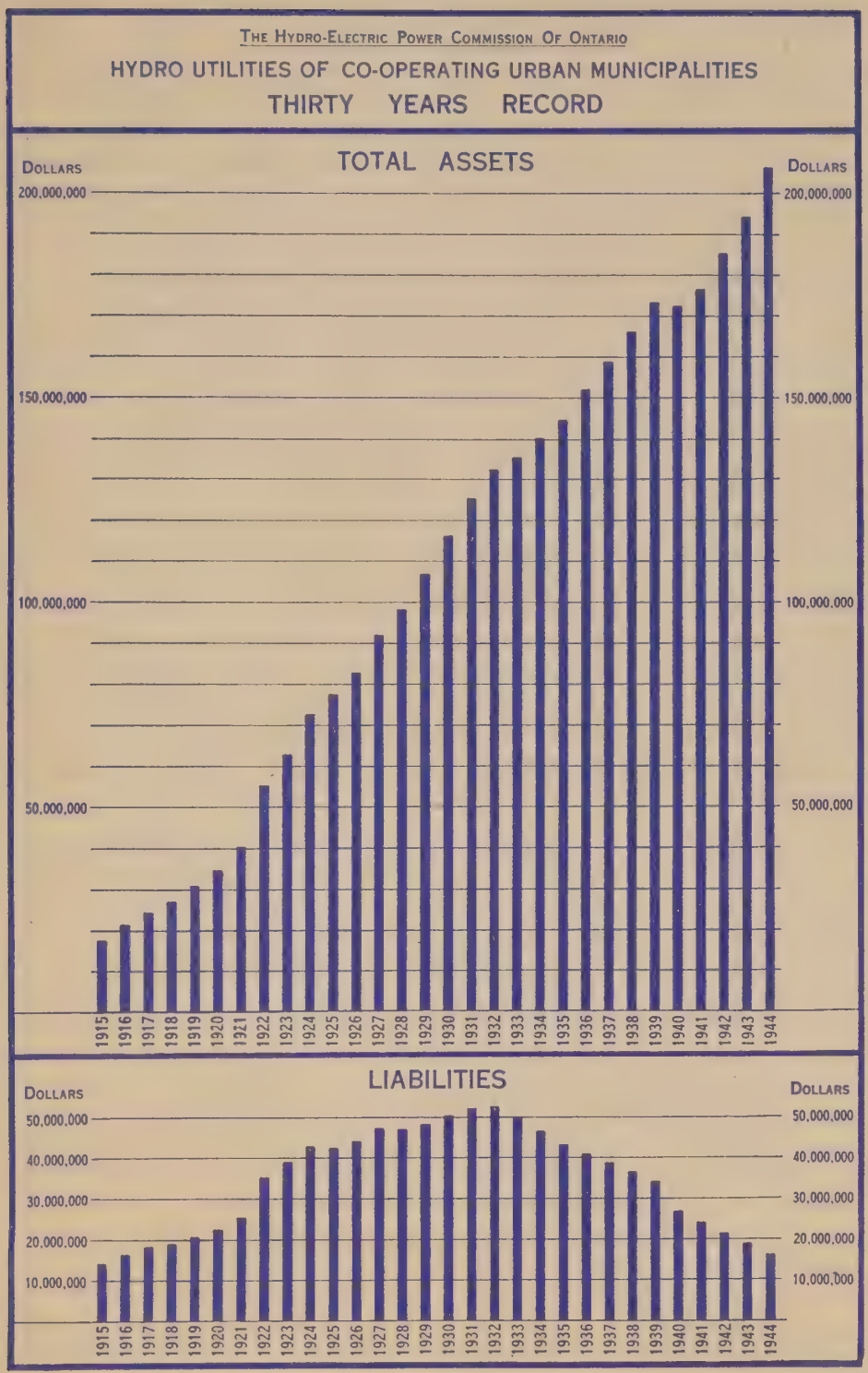


THE HYDRO-ELECTRIC POWER COMMISSION OF ONTARIO

THIRTY YEARS RECORD—ALL SYSTEMS






THE HYDRO-ELECTRIC POWER COMMISSION OF ONTARIO
HYDRO UTILITIES OF CO-OPERATING URBAN MUNICIPALITIES
THIRTY YEARS RECORD
TOTAL ASSETS
DOLLARS
200,000,000
150,000,000
100,000,000
50,000,000
1915 1916 1917 1918 1919 1920 1921 1922 1923 1924 1925 1926 1927 1928 1929 1930 1931 1932 1933 1934 1935 1936 1937 1938 1939 1940 1941 1942 1943 1944
LIABILITIES
DOLLARS
50,000,000
40,000,000
30,000,000
20,000,000
10,000,000
1915 1916 1917 1918 1919 1920 1921 1922 1923 1924 1925 1926 1927 1928 1929 1930 1931 1932 1933 1934 1935 1936 1937 1938 1939 1940 1941 1942 1943 1944

The THIRD field is the operation, by the Commission in the northern part of the Province, of power generating plants, transmission and distribution systems on behalf of the Province of Ontario and mainly supplying power to mining developments. These plants and distribution systems are known as the Northern Ontario Properties.

Broadly, the Commission is entrusted with the responsibility of supplying the electrical needs of the citizens of Ontario at the lowest possible cost. Cost includes all operating and maintenance charges, interest on capital investment and reserve for renewals or depreciation, for obsolescence and contingencies, for stabilization of rates, and for sinking fund or capital payment on debentures.

ORIGIN AND DEVELOPMENT OF HYDRO

The creation of Ontario's co-operative electrical enterprise was largely inspired by the proximity of its rapidly growing industrial areas to Niagara Falls.

At the outset of its operations, Hydro proceeded to construct transmission lines in order to supply Niagara power to the municipalities which first came into partnership, and at that time power was purchased in bulk from privately owned companies. However, due to the rapid growth of industry, particularly during the period of the first great war, 1914 to 1918, the Commission, hard pressed to keep pace with the demand for electricity, soon entered the field of power generation. Several plants were designed and built and existing developments acquired from private owners.

Today the Commission owns and operates 55 hydro-electric power developments situated on rivers large and small throughout the Province, and ranging in size from a small 400 horsepower plant on the Saugeen River at Hanover to the great 525,000 horsepower (391,650 kw) Queenston-Chippawa development on the Niagara River. The maximum normal capacity of the Commission's plants totals 1,720,000 horsepower (1,280,000 kw); in addition, it purchases 910,000 horsepower (678,860 kw), thus putting to useful service in Ontario more than 2,600,000 horsepower (1,939,000 kw). The main transmission lines now total 7,715 route miles, and form transmission networks which include 2,062 miles of 110,000-volt lines, 550 miles of 132,000-volt lines, and 1,025 miles of 220,000-volt lines.

The field of Hydro is Province-wide. At the end of 1945 the Commission was serving 917 municipalities. This number includes about 300 municipalities—cities, towns, villages and suburban areas—operating their own local Hydro utilities; the balance consisting of smaller villages and townships being served by the Commission as part of the consolidated rural power districts.

Acting upon the principles of service at cost, the Hydro and its associated municipalities have been consistently able to reduce rates to all classes of consumers. Today, with a highly experienced technical staff, Hydro is continuing to pioneer in a great many branches of electrical public utility practice in order to provide the best possible service at still lower cost.

FINANCIAL STRUCTURE

At the present time some $493,000,000 is invested in Hydro; $315,000,000 co-operatively by The Hydro-Electric Power Commission, $137,000,000 by the local municipal electrical utilities and $41,000,000 by the Commission in trust for the Province in Northern Ontario Properties serving the mining areas. The total reserves of the Commission now aggregate $224,000,000. The reserves and surplus of the co-operating municipal utilities exceed $120,000,000, while liabilities of these utilities have been progressively reduced and now stand at $16,000,000.

Hydro PROVIDES LOW-COST Industrial AND Commercial POWER

Recent statistics on the cost of electricity to consumers in the urban communities of Ontario reflect the remarkable economy of Hydro service.

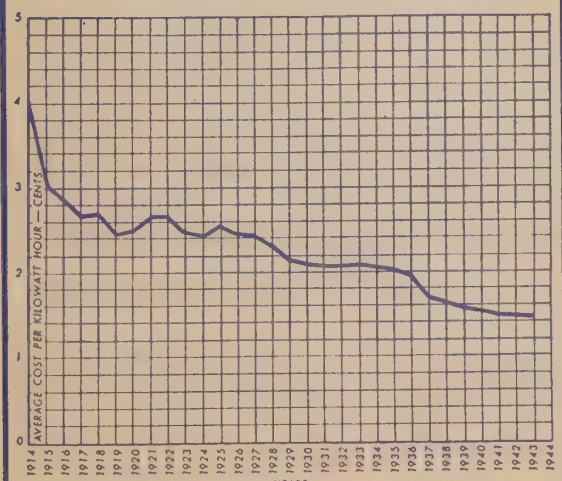
About 50 percent of the retail power supplied by municipal electrical utilities is sold in municipalities where the average cost to consumers, inclusive of all charges, is less than $27.00 per kilowatt ($20.15 per h.p.) per annum; while more than 99 percent of the power supplied to all municipalities is supplied at a charge of less than $40.00 per kilowatt ($29.84 per h.p.) per annum.

Industrial power service is supplied in most instances to plants and factories within the boundaries of the municipality by municipal commissions. However, in order to stimulate industrial growth, a few industries in the Province which require quantities of power are served direct by the Commission on a basis that contributes to the economic stability of the over-all co-operative enterprise.

Commercial lighting service is provided, in general, by the municipalities, and last reports show the average cost to consumers, inclusive of all charges, to be 1.39 cents per kilowatt-hour. Domestic, or residential service, except in the rural areas, is also rendered by municipalities at an average cost throughout the Province of 1.15 cents per kilowatt-hour. In the rural areas the average cost of service to farmers is less than 2.3 cents per kilowatt-hour.

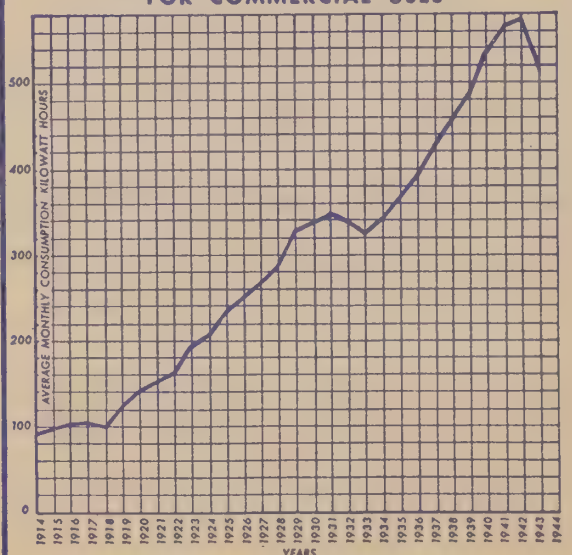
The use of Hydro service in Ontario cities and towns is extensive. The average annual consumption per residential consumer in the municipalities is 2,300 kilowatt hours. In the rural areas, the average annual consumption is 1,600 kilowatt hours. In the case of farm consumers, however, the average annual consumption rises sharply to 2,000 kilowatt hours, and with the progress of the Commission's Five Year Plan for rural electrification and a more open market for electrical appliances, the average consumption of power on the farms of Ontario may soon be expected greatly to exceed that of the urban residential consumer.

DECREASING COST OF ELECTRICITY FOR COMMERCIAL PURPOSES



The average cost per kilowatt for electricity for commercial purposes has been reduced in the last thirty years from 4 cents per kilowatt-hour to 1.44 cents per kilowatt-hour.

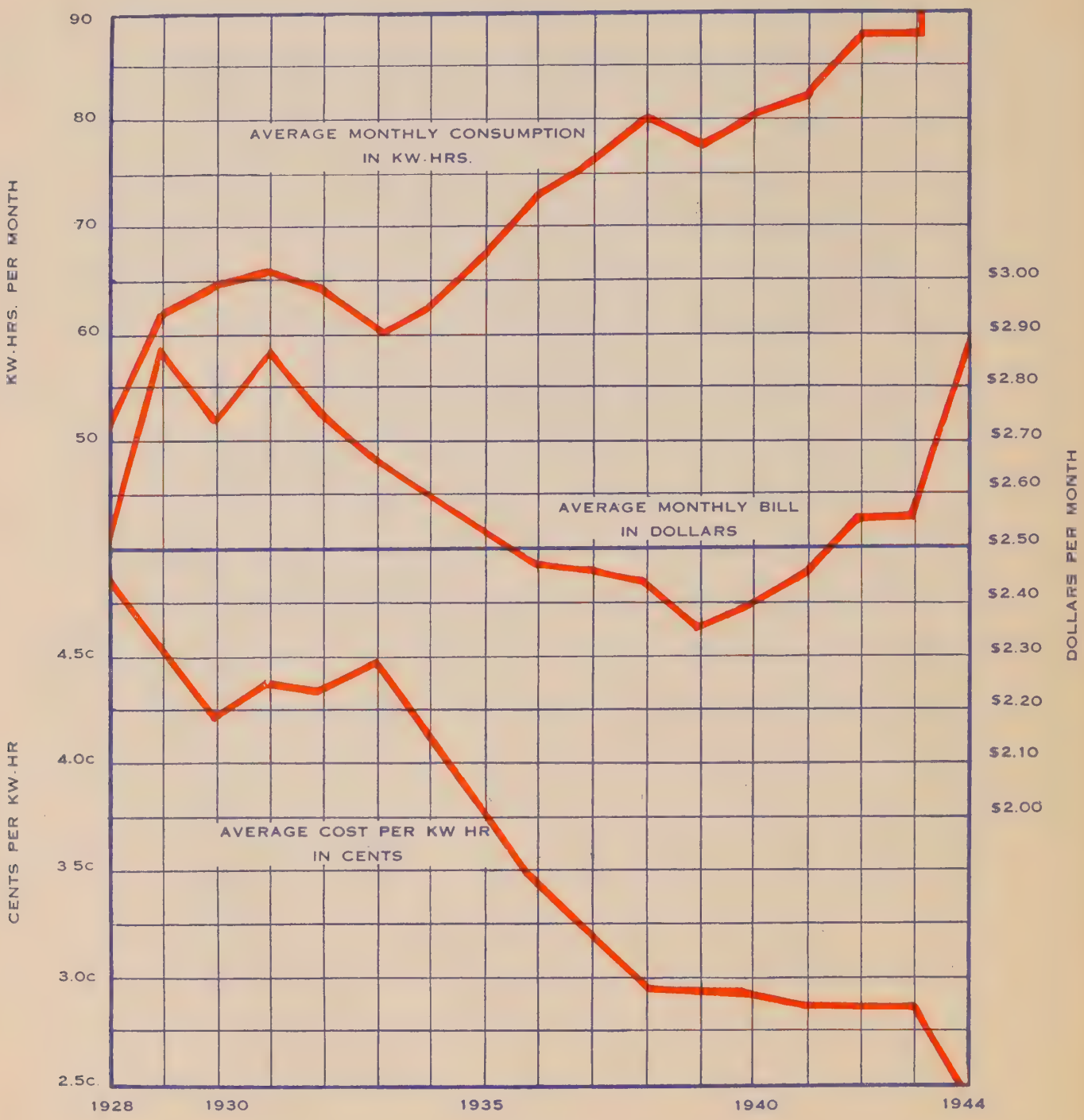
INCREASING USE OF ELECTRICITY FOR COMMERCIAL USES



The use of electricity for store and office lighting, etc., has increased in the last thirty years from an average monthly consumption of 90.8 kilowatt-hours to 516.4 kilowatt-hours.

COMPARISON OF COST OF POWER WITH AVERAGE MONTHLY CONSUMPTION FOR NON-FARM CONSUMERS

	1928	1943	1944
AVERAGE MONTHLY CONSUMPTION	50.7 KW-HRS.	87.6 KW-HRS.	119 KW-HRS.
AVERAGE MONTHLY BILL	$2.51	$2.57	$2.89
AVERAGE COST PER KW-HR.	4.95c.	2.93c.	2.45c.

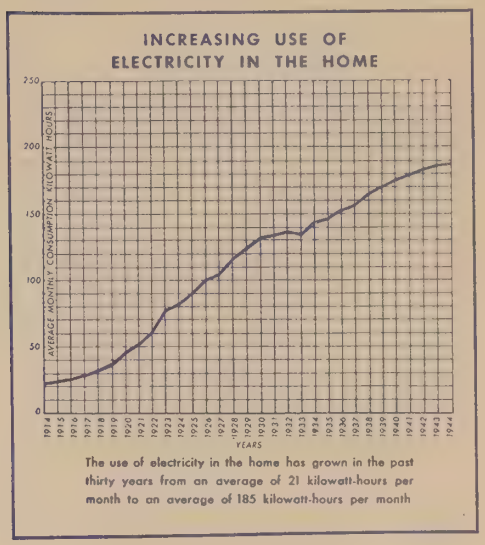


HYDRO PROVIDES LOW-COST ELECTRICITY for the *Home*

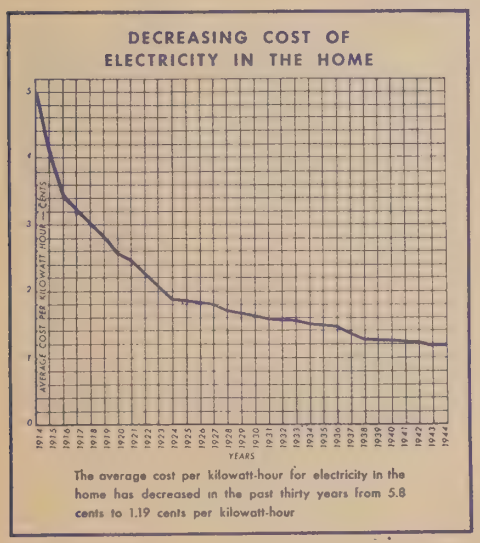
The average annual residential consumption per consumer in municipalities of Ontario is 2,300 kilowatt hours. In the rural areas the average annual consumption is 1,600 kilowatt hours, while the average annual consumption for farm consumers rises sharply to 2,000 kilowatt hours per consumer.

The Hydro Five Year Plan to extend their rural service will add tremendously to the rural and farm consumption, as well as the number of consumers. This is a big potential market for all classes and kinds of household and farm electrical appliances.

It is anticipated that the Five Year extension of hydro rural service alone will create a market for 18,800 ranges, 58,500 washers, 6,950 flat-rate water heaters, 90,000 irons, 24,600 refrigerators and 95,500 radios. In the barn 5,450 grain grinders, 3,150 milking machines, 7,400 water pumps, 2,300 milk coolers.



The use of electricity in the home has grown in the past thirty years from an average of 21 kilowatt-hours per month to an average of 185 kilowatt-hours per month



The average cost per kilowatt-hour for electricity in the home has decreased in the past thirty years from 5.8 cents to 1.19 cents per kilowatt-hour

A FIVE YEAR POST-WAR PLAN

TO EXTEND

HYDRO RURAL SERVICE

In spite of the very active industrial development in Ontario during recent years—or, as it would be better put, *because* of this industrial development, with the increased population it has attracted—agriculture occupies a more prominent place than ever in the economy of the Province.

The application of electrical power to agricultural requirements has long been recognized by the Commission as the key to farming as a successful business in Ontario. Production and conservation of crops and livestock depend more and more upon electrical aids; and the effective application of electricity to many household uses is essential if the standard of farm living, in convenience and comfort, is to be placed on anything like a parity with that of the urban resident.

Between 1928 and 1941 the work of extending power services to farming and rural areas was actively pursued by the Commission; so that at the end of the latter year, there were more than 20,000 miles of distribution line, while some 56,000 farms were enjoying the benefits of Hydro. This represented 55 percent of potential consumers. See page 9.

The programme for the extension of RURAL SERVICES which the Commission had in mind was retarded by the grave economic depression of 1931-35, and practically brought to a standstill in 1941, when every kilowatt of power it was possible to divert was used to sustain the war industry. Now that the war emergency is past this plan is in operation. It is a Five Year Post-War Plan to extend Hydro Rural Services, and has for its objective the systematic extension of electric services to rural communities and farms so that at the end of a five year period of construction 85 percent of all rural consumers in the Province and 84 percent of actual farm consumers will be provided with electric power for all requirements.

NEW CONSTRUCTION

The Five Year Plan calls for the construction of 7,329 miles of new rural distribution line —of which 490 miles of the 1,135 miles scheduled for the first year had already been built at January 1, 1945—and the expenditure by the Hydro-Electric Power Commission alone of a total of $22,439,875 on labour and materials. It is estimated that the consumers to be benefited by the plan, both new and existing, will spend close to $43,173,259 on the wiring of their homes and farms and in the purchase of the necessary electrical appliances and farm equipment. Total expenditure, therefore, by the Commission and consumers, will on the average, involve spending by both parties concerned of over $1,000,000 a month for five years. Employment, direct and indirect, during the five year period of construction is estimated at a total of 26,231 man years. Apart from the benefits to be derived by the consumers of electricity, the Five Year Plan should, therefore, be a factor in the post-war rehabilitation of the Province.

The full use of Hydro on the farm depends on more than the construction of rural lines and installation of services. It has always been recognized by Hydro that co-operation with the farmer will result in continued progress in rural development. To accomplish this, the Commission has planned an educational programme as an integral part of the Five Year Plan to familiarize the farmer with the objectives of the plan and its potentialities and to assist him in all possible ways to obtain the maximum benefits of electrification.

The full co-operation of electrical appliance dealers and manufacturers, farm implement dealers and manufacturers and others interested in the rural market is being sought. As the plan progresses displays of electrical appliances and farm equipment will be arranged in rural offices of the Commission, as well as at fairs and exhibitions.

The Commission encourages its superintendents to give assistance to rural residents in solving their electrical problems and the farmer is invited to take advantage of the service which the superintendent can render.

To complement the work of the rural superintendent, it is planned to provide rural representatives whose function will be to contact present and prospective Hydro users and to advise them on all matters pertaining to the use of Hydro and electrical equipment on the farm. In this connection, the Commission plans to institute an advisory wiring service to assist the farmer in properly wiring his farm.

A number of motor coaches, equipped to display and demonstrate both home appliances and farm equipment will be placed in service. These coaches will make scheduled appearances in rural districts in every part of the Province, and will also be used for demonstration purposes at all fairs and exhibitions, or wherever such an activity might be called for. Farm newspapers, magazines and motion pictures will also assist in demonstrating the varied uses of Hydro on the farm.

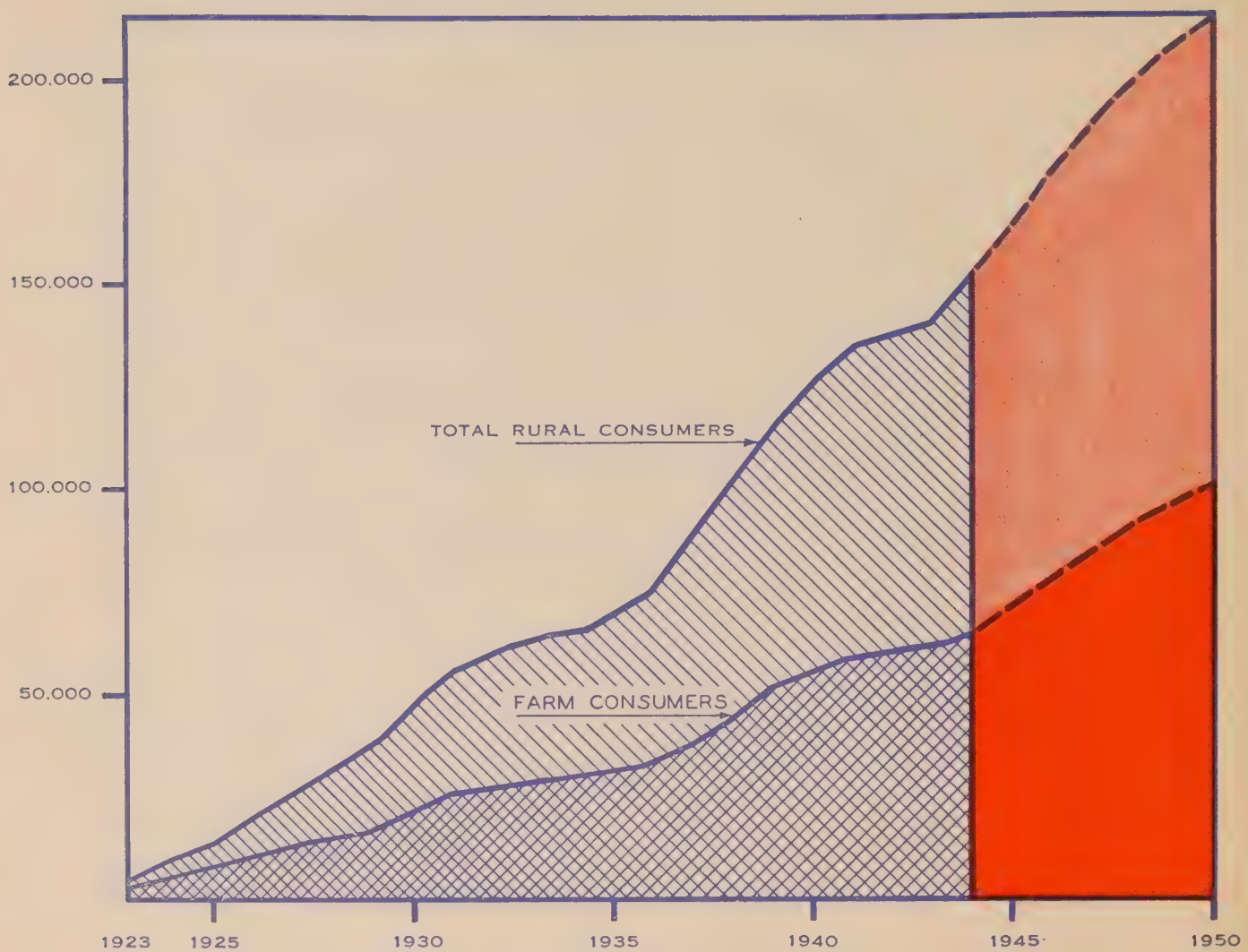
WHAT ELECTRICITY MEANS TO THE FARMER

The importance of the farmer to our national economy is well recognized. In a province such as Ontario where a large section of the population is engaged in diversified agricultural pursuits, the maintenance of the farmer's position, both as a producer and a consumer, must always be a chief concern. Ways and means must be continually sought to help keep the farmer in step with modern methods of production and marketing. Not less important, the farmer must be provided with opportunities for a home life comparable in convenience and comfort to that enjoyed by the city dweller.

Hydro, in providing the rural resident and the farmer with cheap electrical power, is a most important factor in this process. There is no doubt whatever that the extensive use of electricity on the farm means reduced costs and increased production. It is the aim of The Hydro-Electric Power Commission of Ontario to encourage and assist rural communities to use electricity wherever and whenever possible.

Electricity is vital to farms of all classes and types—the mixed farm, the fruit farm, the tobacco plantation, the dairy farm, the cattle ranch. The typical farm in Ontario is, of course, the mixed farm, and for it Hydro is an invaluable asset.

ANNUAL GROWTH
IN
NUMBER OF RURAL CONSUMERS

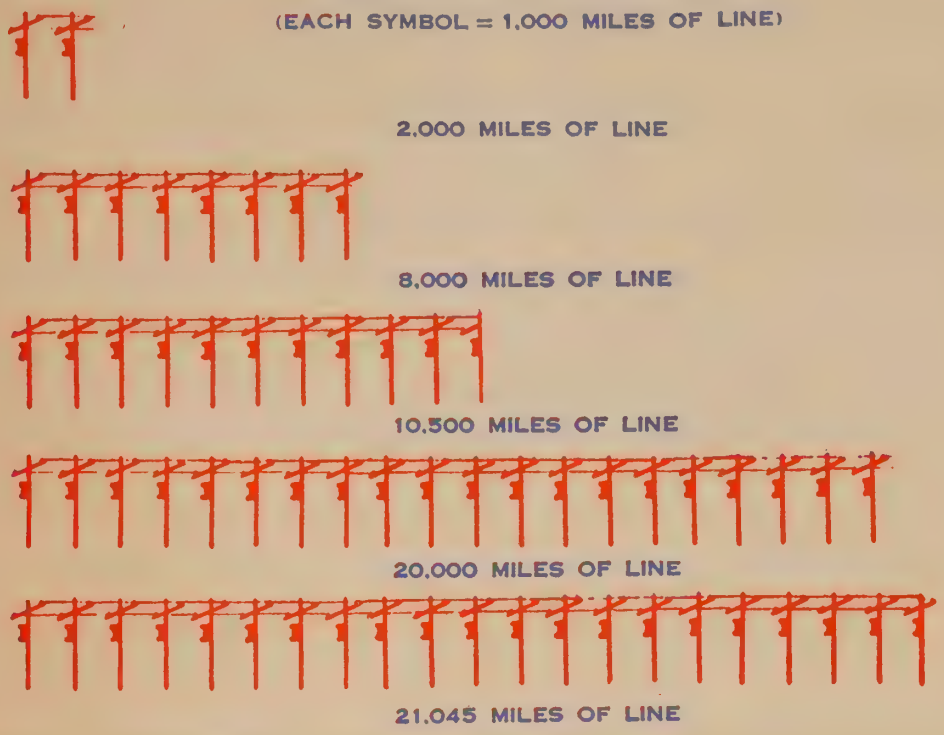


TOTAL NUMBER OF CONSUMERS AND NUMBER OF FARM CONSUMERS SERVED BY THE RURAL HYDRO SYSTEM FROM 1923 TO 1944 — ALSO ESTIMATED GROWTH FROM 1945 TO 1950.

THE GROWTH OF RURAL ELECTRIFICATION IN ONTARIO SHOWN IN 5-YEAR PERIODS SINCE 1921

SYSTEM GROWTH

(EACH SYMBOL = 1,000 MILES OF LINE)



FARMS USING HYDRO

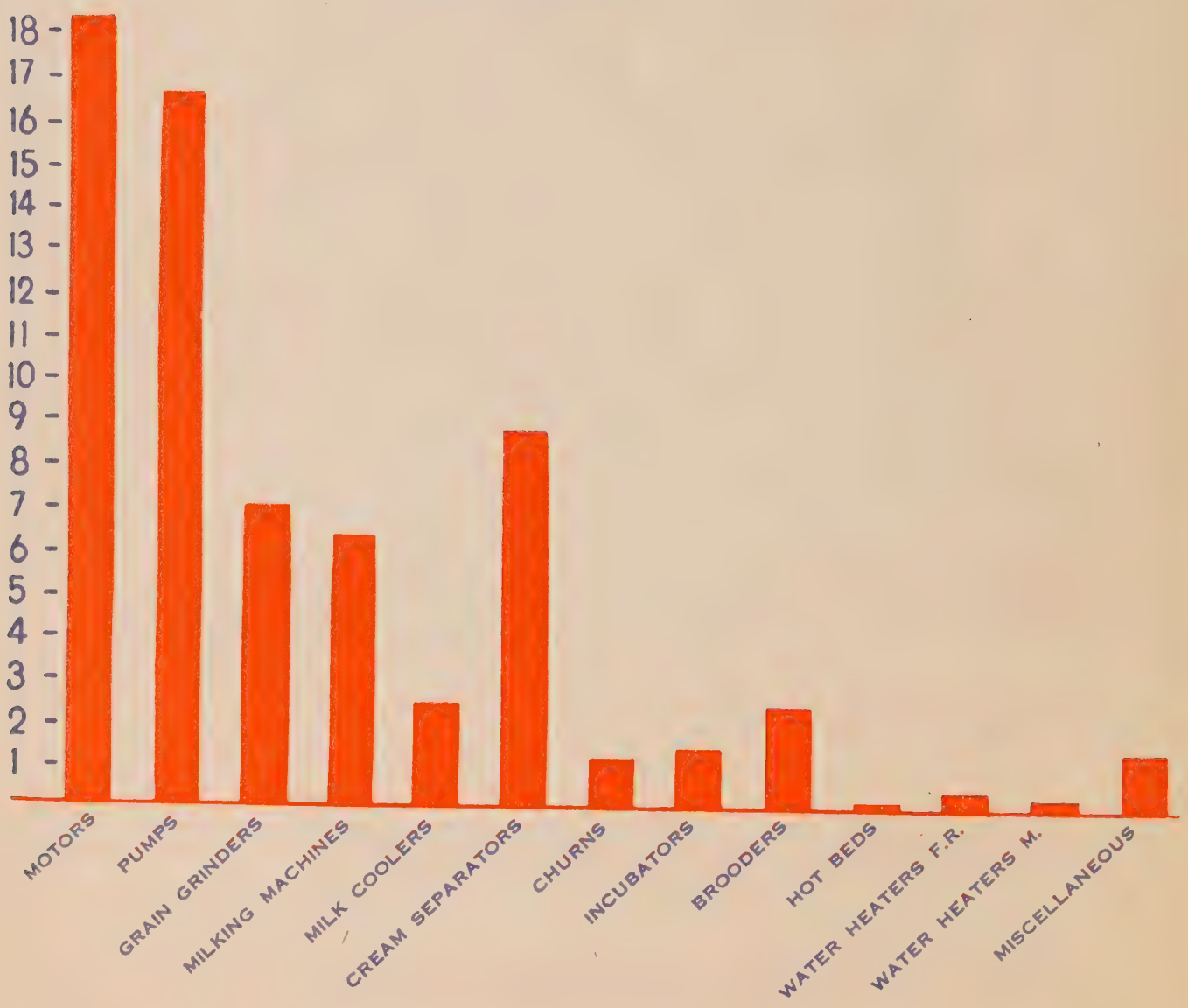
(EACH SYMBOL = 5,000 FARMS)

POWER EQUIPMENT IN USE ON FARMS AND PERCENTAGE SATURATION — 1942

EQUIPMENT	NUMBER	EQUIPMENT	NUMBER
MOTORS	11,240	INCUBATORS	828
PUMPS	10,186	BROODERS	1,550
GRAIN GRINDERS	4,293	HOT BEDS	56
MILKING MACHINES	3,920	WATER HEATERS F.R.	181
MILK COOLERS	1,517	WATER HEATERS M.	113
CREAM SEPARATORS	5,302	MISCELLANEOUS	861
CHURNS	656		

ESTIMATED VALUE $5,775,455.00

AVERAGE INVESTMENT PER CONSUMER $92.67



RESEARCH

As an integral part of the Five Year Plan for rural electrification, tests with regard to certain electrical appliances and equipment are being conducted in the Commission's research laboratories in Toronto. One of these, it is interesting to note, is in connection with a quick freezing and cold storage unit economical in operation and low in cost; while a radical new design in a flat rate water heater is being developed by the Commission's engineers.

REDUCED RATES

Statistics concerning the cost of power to rural consumers and kilowatt-hour consumption provide an interesting picture.

In 1928 the average consumption per farm was less than 100 kilowatt-hours per month; in 1944 it had risen to almost 160. In contrast, the farmer's monthly bill, which was roughly $5.00 in 1928, had dropped to an average of about $3.40 in 1944. Likewise, his average cost per kilowatt-hour had come down from 5 cents to nearly 2 cents. This clearly indicates that with the increasing use of Hydro, the cost to the rural user is materially reduced.

The converse is also found to hold true, namely, that a reduction in rates fosters an increase in the use of electricity. Consequently, the important revisions in the Hydro rural services made by the Commission in 1944 with the approval of the Provincial Government have encouraged a greater use of energy, and have enabled the Commission to provide a further reduction in rural rates.

A uniform rate now obtains for service throughout rural Ontario of 3.5c per kilowatt-hour for the first block of energy, 1.6c per kilowatt-hour for the second block, and 0.75c per kilowatt-hour for all remaining energy.

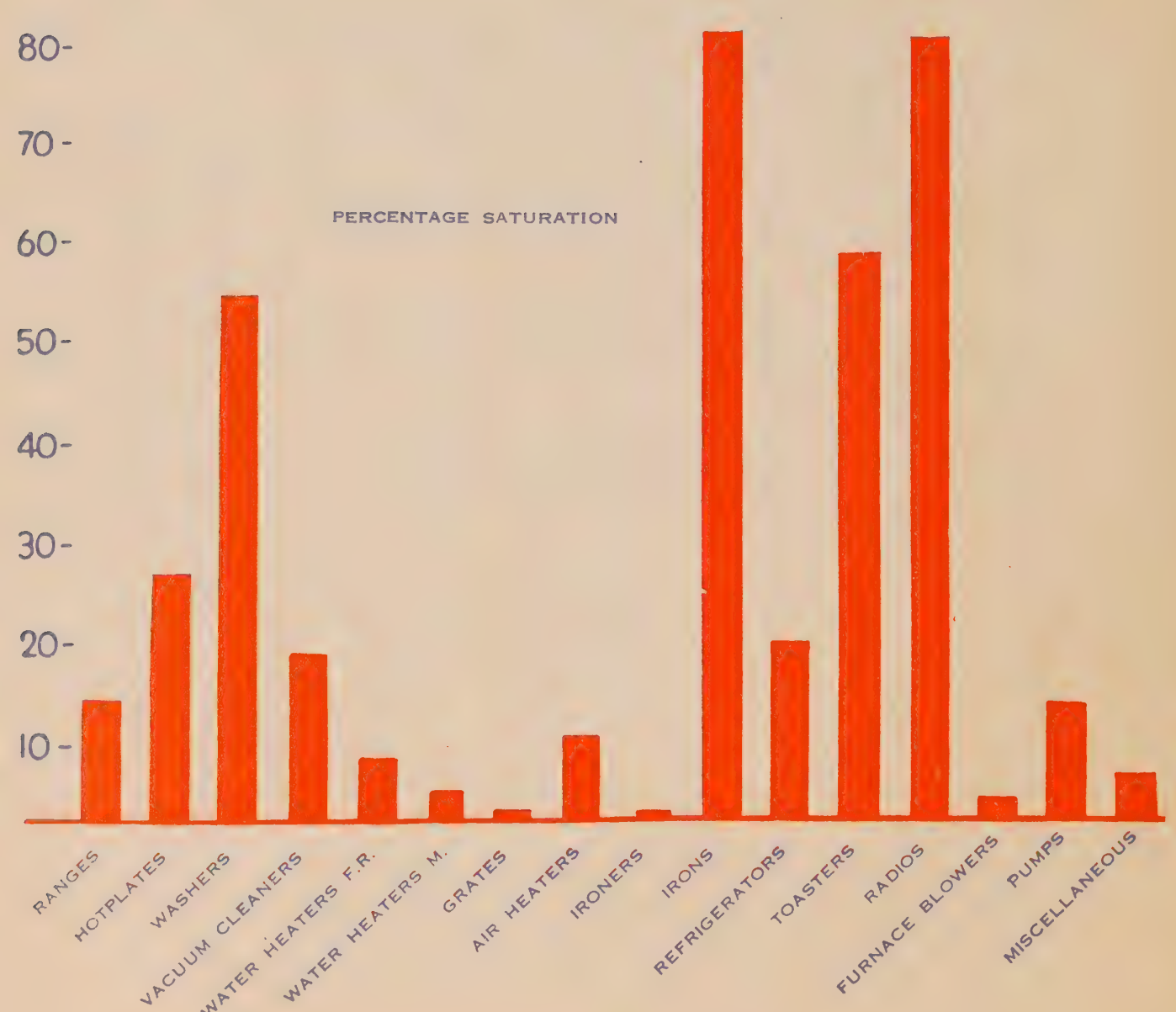
Low-cost power, supplied by Hydro, is an important factor in Ontario where industry is over 90% electrified. Because it is industry's main source of power Hydro, by constant planning, endeavours to keep ahead of demand by being prepared, at all times, to meet the ever-growing need for more and more power.

Along with its many other activities, The Hydro-Electric Power Commission of Ontario is now planning for the interchange of power loads between the divisions of its far-flung systems which extend from the Quebec border to the Detroit River and from the shores of Lake Ontario to the northern hinterlands whose rivers empty into arctic waters, at James Bay. This undertaking, when completed, will enable the Commission to divert surplus power wherever required, and together with developments on the Ottawa River, which will add another 500,000 horsepower to the Commission's output, should materially assist in meeting the increasing demands for power in all parts of the Province.

With much accessible waterpower still remaining undeveloped in the Province and with other sources available through lease or purchase, there is no doubt that The Hydro-Electric Power Commission of Ontario will be able to match its output to increasing demands and to provide a reliable service for all enterprises which may contemplate location in this progressive and prosperous Province.

APPLIANCES IN USE IN THE NON-FARM RURAL HOME AND PERCENTAGE SATURATION — 1942

APPLIANCES	NUMBER	APPLIANCES	NUMBER
RANGES	7,243	IRONERS	914
HOTPLATES	13,524	IRONS	41,751
WASHERS	28,270	REFRIGERATORS	10,184
VACUUM CLEANERS	9,730	TOASTERS	29,240
WATER HEATERS F.R.	2,408	RADIOS	42,033
WATER HEATERS M.	1,303	FURNACE BLOWERS	1,269
GRATES	420	PUMPS	7,112
AIR HEATERS	3,992	MISCELLANEOUS	2,532
ESTIMATED VALUE	$12,822,617.00	AVERAGE INVESTMENT PER CONSUMER	$236.57

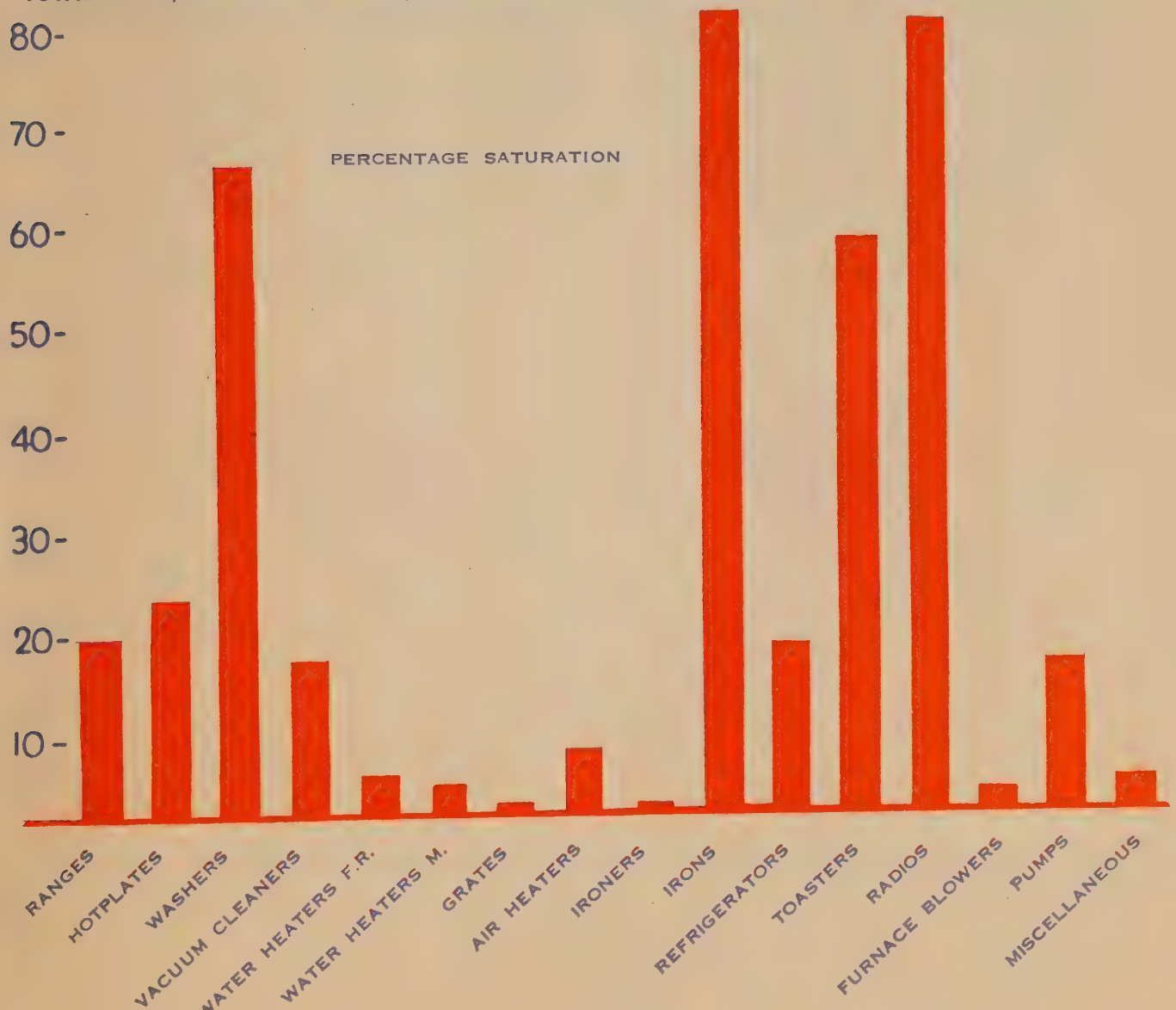


APPLIANCES IN USE IN THE FARM HOME AND PERCENTAGE SATURATION – 1942

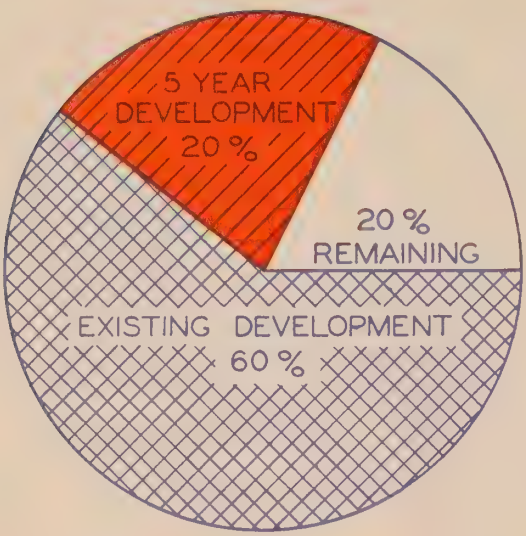
APPLIANCES	NUMBER	APPLIANCES	NUMBER
RANGES	11,688	IRONERS	938
HOTPLATES	14,921	IRONS	50,314
WASHERS	40,014	REFRIGERATORS	10,913
VACUUM CLEANERS	10,651	TOASTERS	35,465
WATER HEATERS F.R.	2,739	RADIOS	49,747
WATER HEATERS M.	1,481	FURNACE BLOWERS	1,393
GRATES	539	PUMPS	10,480
AIR HEATERS	4,970	MISCELLANEOUS	2,276
ESTIMATED VALUE	$16,024,388.00	AVERAGE INVESTMENT PER CONSUMER	$257.13

TOTAL VALUE, FARM AND HOME $21,799,843.00

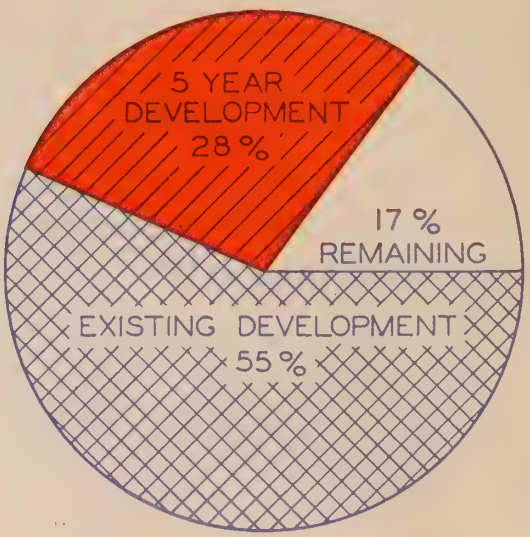
TOTAL INVESTMENT, FARM AND HOME $349.80



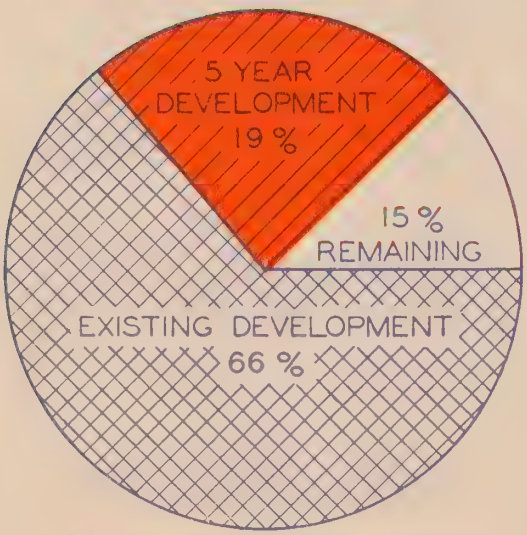
PRESENT STATUS OF RURAL HYDRO DEVELOPMENT AND POSITION AT THE END OF THE 5 YEAR PLAN



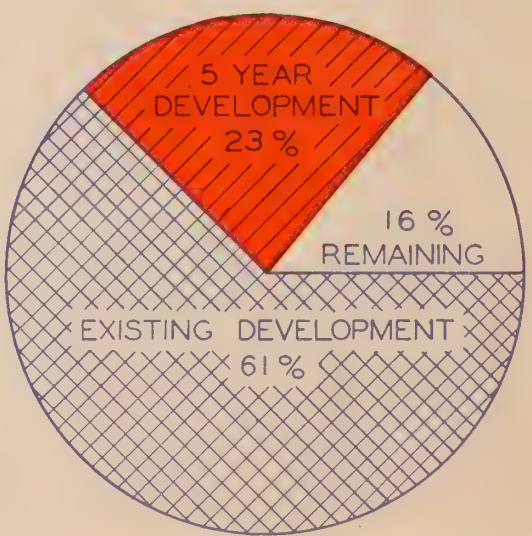
MILES OF LINE



FARM CONSUMERS



NON FARM CONSUMERS



TOTAL CONSUMERS

ONTARIO'S UNIQUE *Electrical* SERVICE

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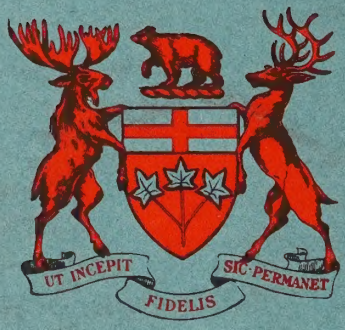

ONTARIO

CANADIAN MARKET STATISTICS
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